# BIS2GO User Manual

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User Manual

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IT creates business value

SIEMENS

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# 1 Overview of symbols

The BIS2GO user manual uses various symbols and notes.

These notes support the users and inform them how to use BIS2GO correctly.

| | |
|---|---|
| | Caution:<br>Information or notes to be observed to avoid malfunctions |
| | Note:<br>Important notes for more effective use of BIS2GO. |
| | Tip:<br>Helpful tips for easier use of BIS2GO. |

The BIS2GO application uses the following symbols.

| Symbols | Explanation |
|---|---|
|  | Mandatory field: an entry must be made in this field |
| | Screen containing the mandatory fields |
| | Display explanations for entry field |
| | Display message or details |
| | Download message in XML format |
| | Display message as PDF ready for printing |
| | Display business transaction |
| | Display item details |
| | Reject item |
| | Accept item |
| | Generate invoice on the basis of an order response |
| | Show further entry fields |
| | Show calendar |

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# 2 BIS2GO introduction

BIS2GO offers an electronic data exchange on the basis of Internet technologies. This solution enables continuous electronic business processes and low process costs with a minimum use of technology.

In BIS2GO, users are assigned to certain roles. The assignment to a role essentially determines the functionality the user can use for processing messages (e.g. only a supplier can receive orders and generate invoices). A user can be assigned to both, the supplier and the customer role.

## 2.1 BIS2GO login

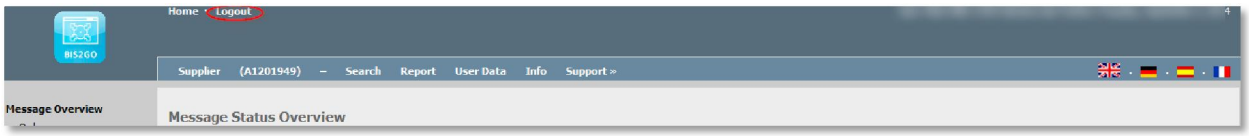
The BIS2GO login screen can be accessed through the following URL:
https://webedi.siemens.de/bis2go.

1. Enter the user data sent by the support team.
2. Click “Login“ to confirm your entry.

| | |
|---|---|
| | Caution:<br>The password must be changed after the first login. |
| | Note:<br>If the administrator has activated the PKI login (preferred mode) you can also log in with your smartcard. To do so, you need to click the “PKI“ check box. |

## 2.2 BIS2GO logout

You can log out of BIS2GO at any time, and can log in again with the same account or with a different account.




➢ Click “Logout“ to log out.

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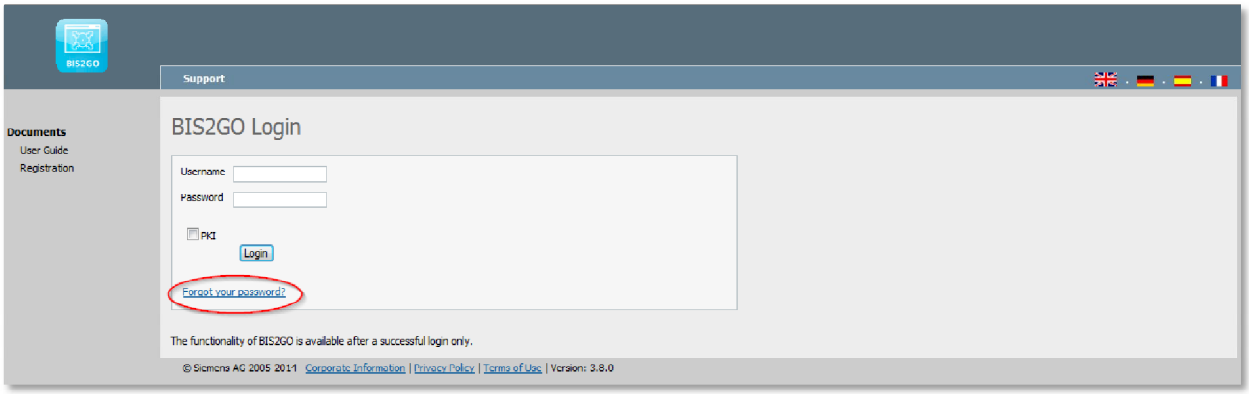
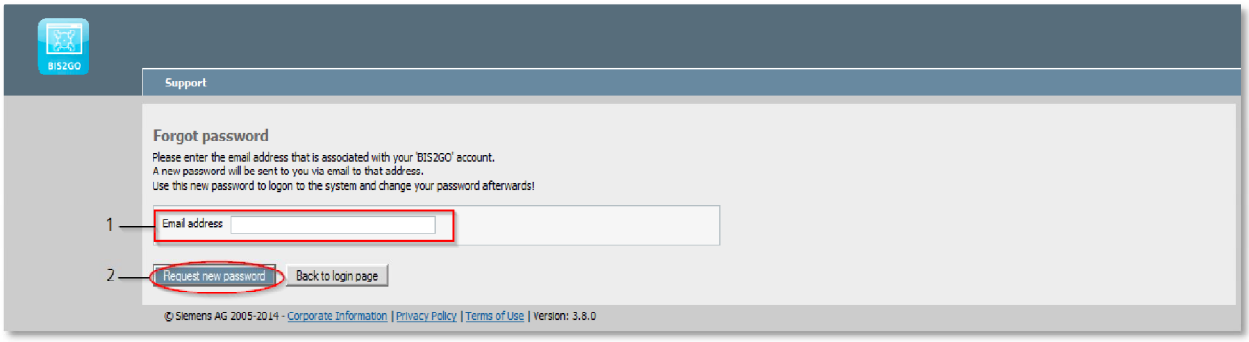
## 2.3 Forgot your password

If you have forgotten your password, click the "Forgot your password?" link in the login screen.





BIS2GO
Support
Forgot password
Please enter the email address that is associated with your 'BIS2GO' account.
A new password will be sent to you via email to that address.
Use this new password to logon to the system and change your password afterwards!
1
Email address
2
Request new password
Back to login page
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1. Enter your BIS2GO email address.
2. Click "Request new password".

✓ A new password will be sent to the email address you entered.

## 2.4 Select partner roles

If you have been assigned the partner roles "Supplier" and "Customer" you can select these roles after the login.

➢ Click ▼ to select the partner role.

| | |
|---|---|
| | Note:<br>The partner role can only be changed in the message overview. |

# 3 Administration

## 3.1 Perform search

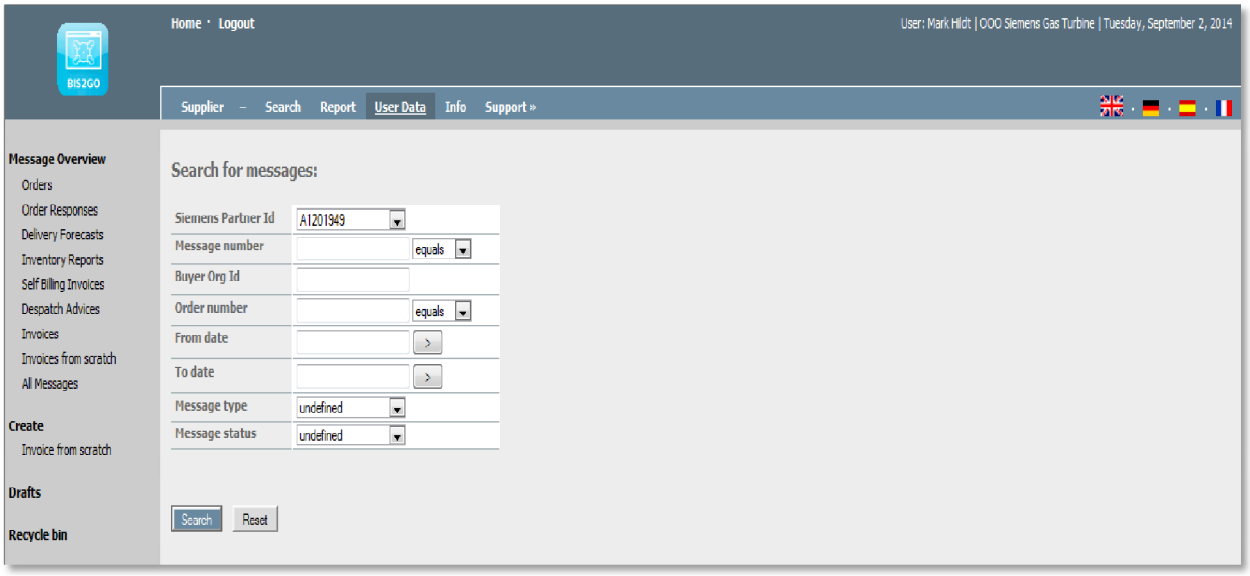
With “Search“ you can find messages as quickly as possible.

Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
Supplier (A1201949) – Search Report User Data Info Support »
Message Overview
Message Status Overview

➢ Click “Search“ to get to the message search.

The message search function provides the following search options:

- Siemens Partner ID
- Message number
- Buyer Org-Id
- Order number
- From date
- To date
- Message type
- Message status




| | |
|---|---|
| | Note:<br>You can also combine various selection criteria. |

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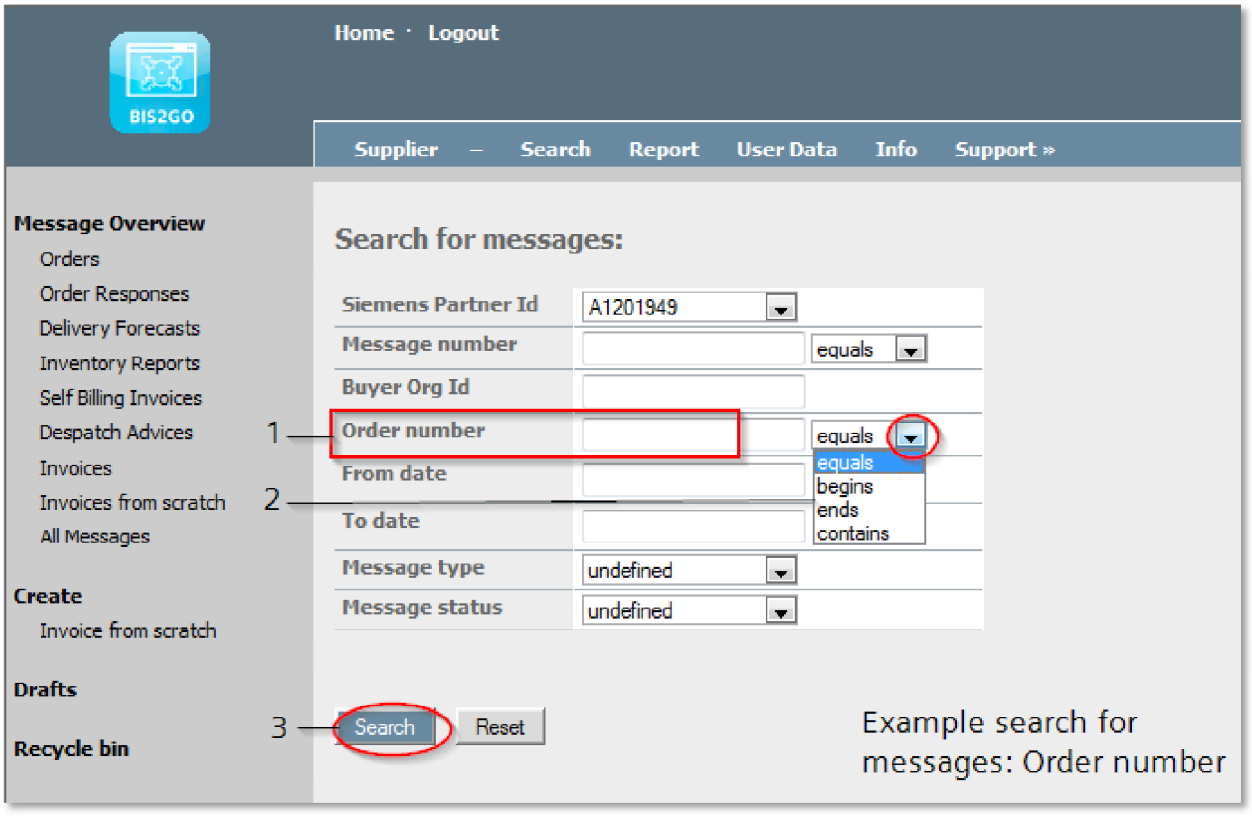
## 3.1.1 Search for message number/order reference number

Prerequisite: You must have a “message number“ or an “order number“.




1. Click the desired field and enter the number to be searched for.
2. Use the ▼ button to select the desired search option.
3. Click “Search“ to start the search.

You can select the following search options:

| Search option | Description |
|---|---|
| equals | The number to be searched for equals the number you entered. |
| begins | The number to be searched for begins with the number you entered. |
| ends | The number to be searched for ends with the number you entered. |
| contains | The number to be searched for contains the number you entered. |

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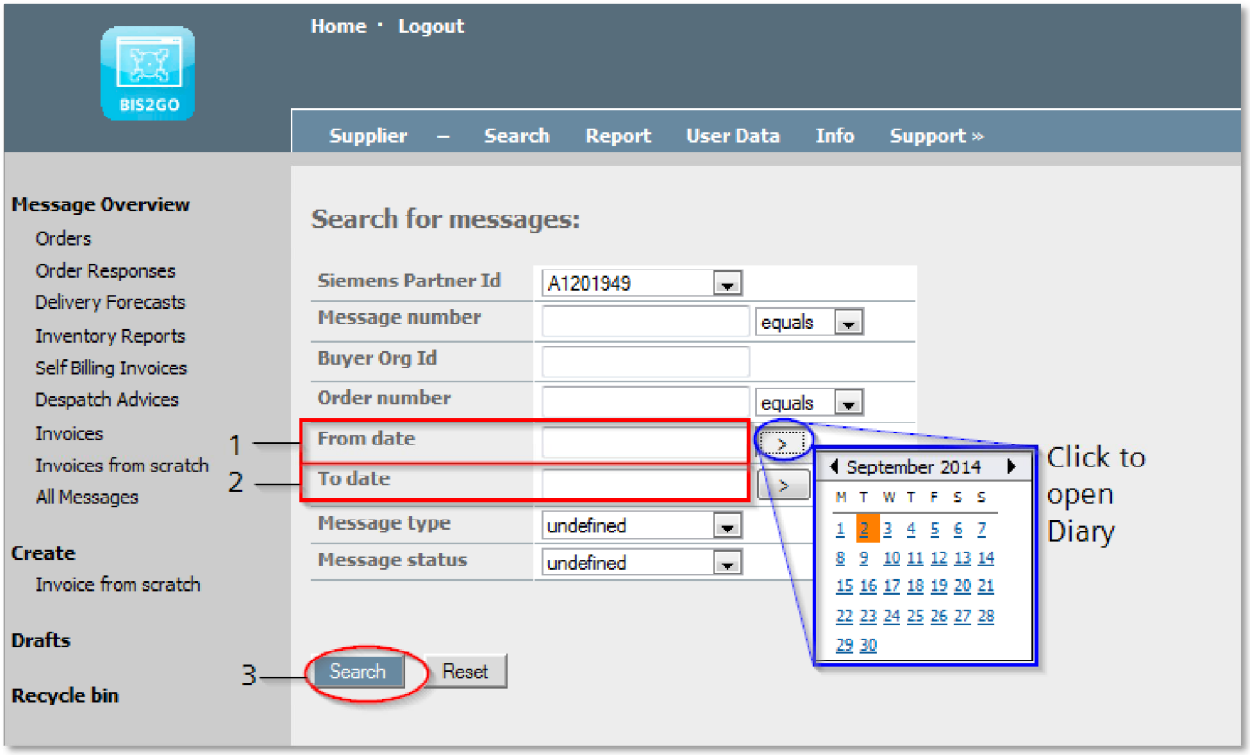
## 3.1.2 Search for date

You can use the search option “From date“ and “To date“ to search for messages from a certain period of time.




1. Click the “From date“ field and enter the date.
2. Click the “To date“ field and enter the date.
3. Click “Search“ to start the search.

| | |
|---|---|
| | Tip:<br>With the > button you can open the calendar and select the desired date. |

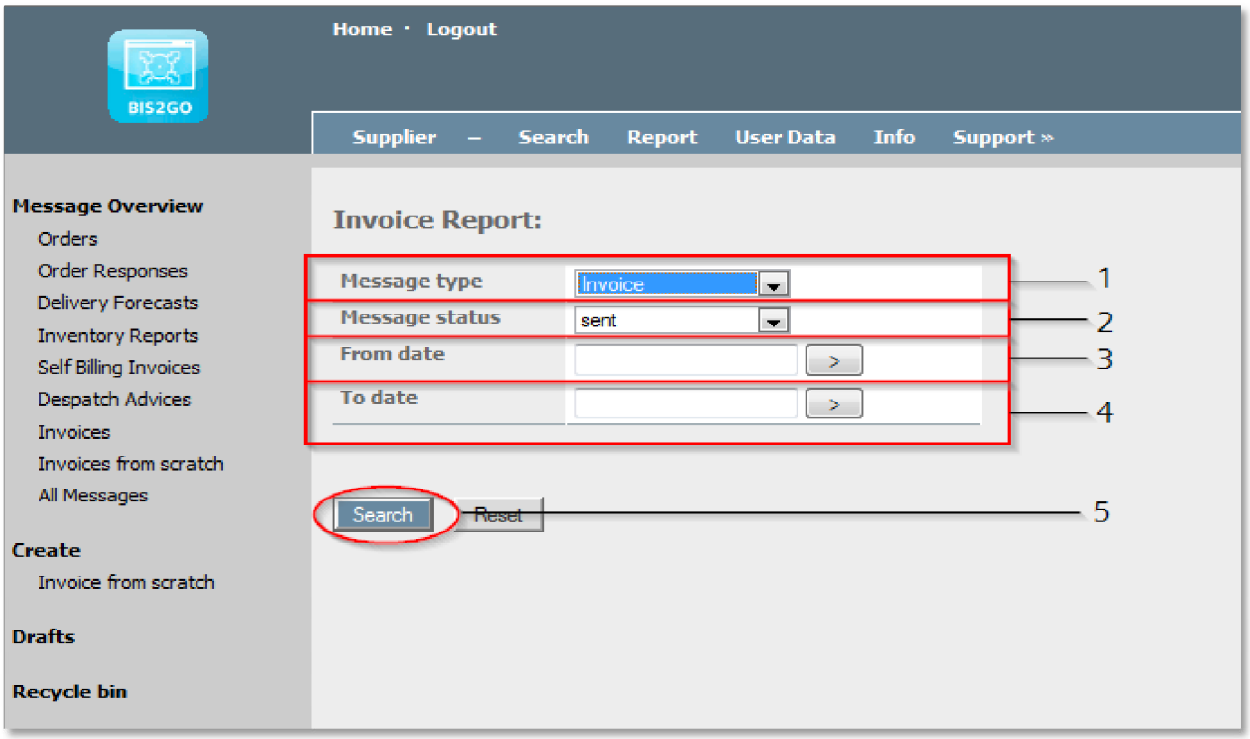
# 3.2 Create report

In “Report“ you can find an overview of sent or generated invoices.

Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
BIS2GO
Supplier (A1201949) – Search Report User Data Info Support »
Message Overview
Message Status Overview

➢ Click “Report“ to access the overview.

To create an invoice report you proceed as follows:




1. Select the message type using the button.
2. Select the message status using the button.
3. Click the “From date“ field and enter the date.
4. Click the “To date“ field and enter the date.
5. Click “Search“ to start the search.

✓ The messages found by the search are displayed at the bottom.

Tip:

With the button you can open the calendar and select the desired date.

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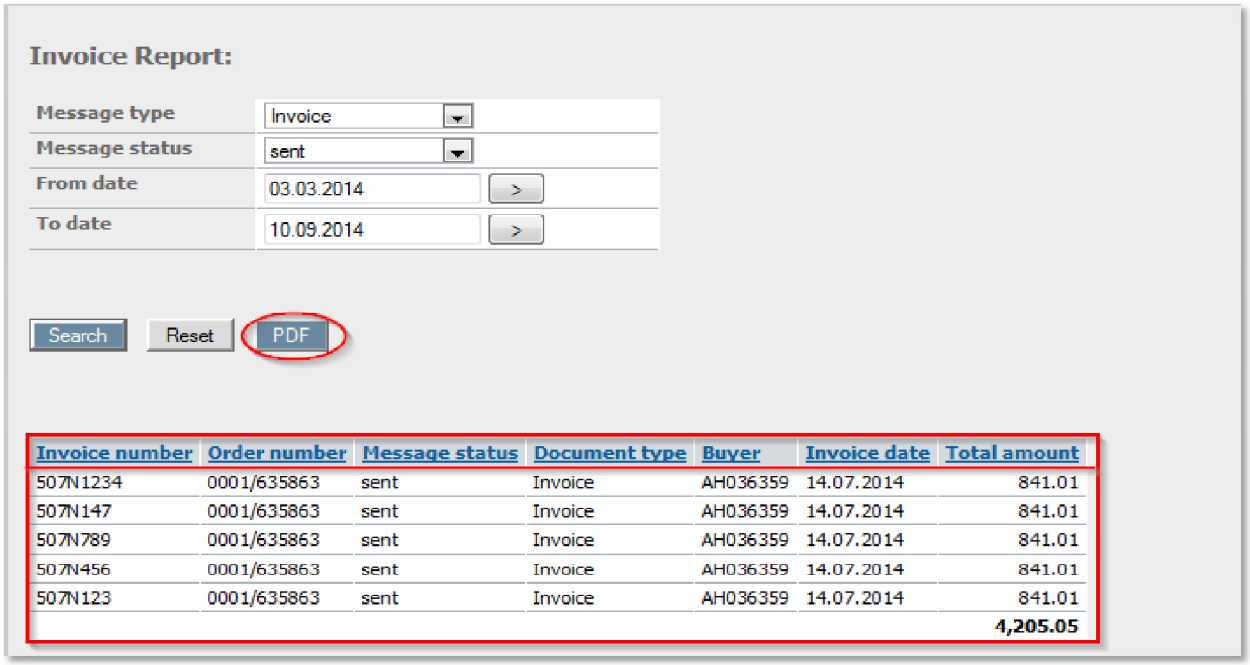
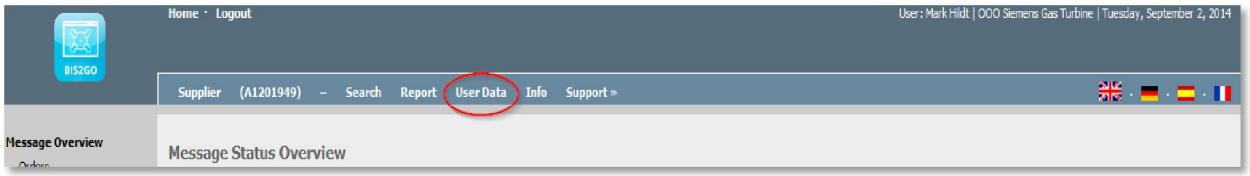



- Click one element in the header line to sort the display by one column.
- Click “PDF“ to download the file or to print it.

## 3.3 Change user data

In the “User Data“ menu you can adjust and update your data.


Home · Logout
User: Mark Hidt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
BIS2GO
Supplier (A1201949) – Search Report User Data Info Support »
Message Overview
Message Status Overview

- Click “User Data“ to access this menu.

Here you can find the following tabs for editing your information:

- Person information
- Login information
- Partner information
- Additional ORG-IDs
- Persons list (for administrators only)

The following sub-chapters describe all tabs in more detail.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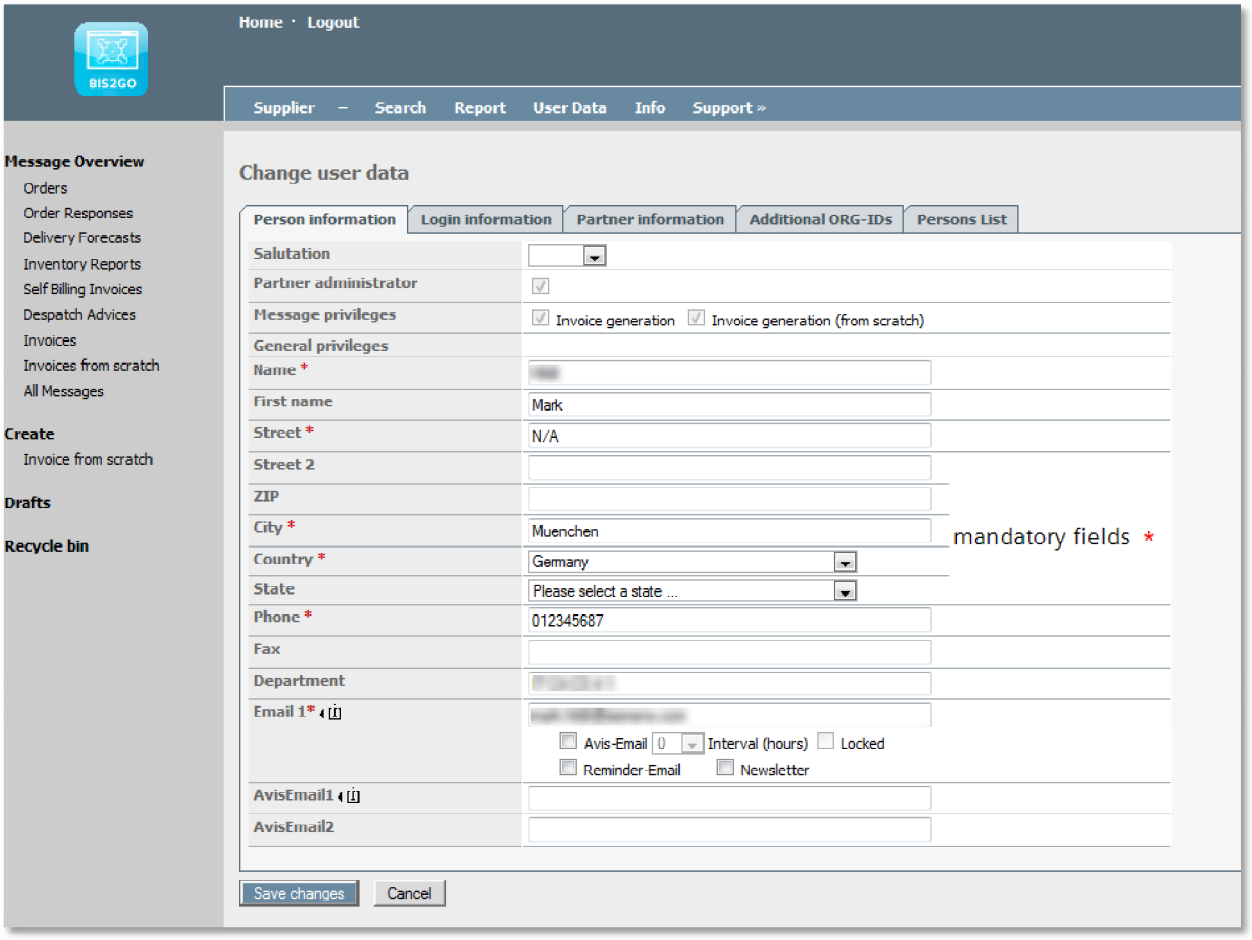
## 3.3.1 Change person information

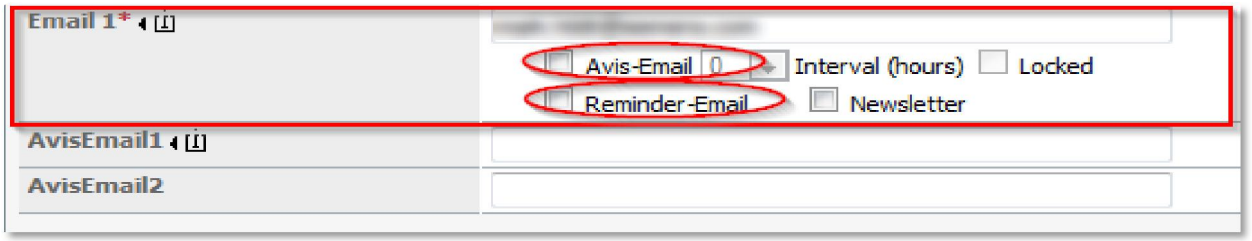
In the “Person information“ tab you can edit your user information.

To edit the data, proceed as follows:




1. Click the desired field to edit the contents.
2. Use the “Return“ key on your keyboard to delete the contents.
3. Enter the desired contents.
4. Go to the next field using the left mouse button or the “Tab“ key on your keyboard.

In mandatory field “Email 1“ you can change several options.

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| Email type | Description |
|---|---|
| “Email 1“ | Receives one email for any of the email types marked:<br>“Avis-Email“<br>Sends an email to the email addresses entered in “Email 1“, “AvisEmail1“, “AvisEmail2“ whenever a message is received<br>“Reminder-Email“<br>Sends a reminder email if messages in BIS2GO remain unread for more than 2 days |
| “AvisEmail1“/ “AvisEmail2“ | Offers the possibility to enter additional email addresses that shall also receive an “Avis-Email“ |

After you have completed your changes, confirm them with “Save changes“.

| | |
|---|---|
| | Caution:<br>Make sure that your data is always up-to-date. |
| | Note:<br>Some fields have already been preset by the BIS2GO registration. |
| | Note:<br>Fields marked with * are mandatory fields. |
| | Tip:<br>Use the button to display explanations for the respective entry field. |

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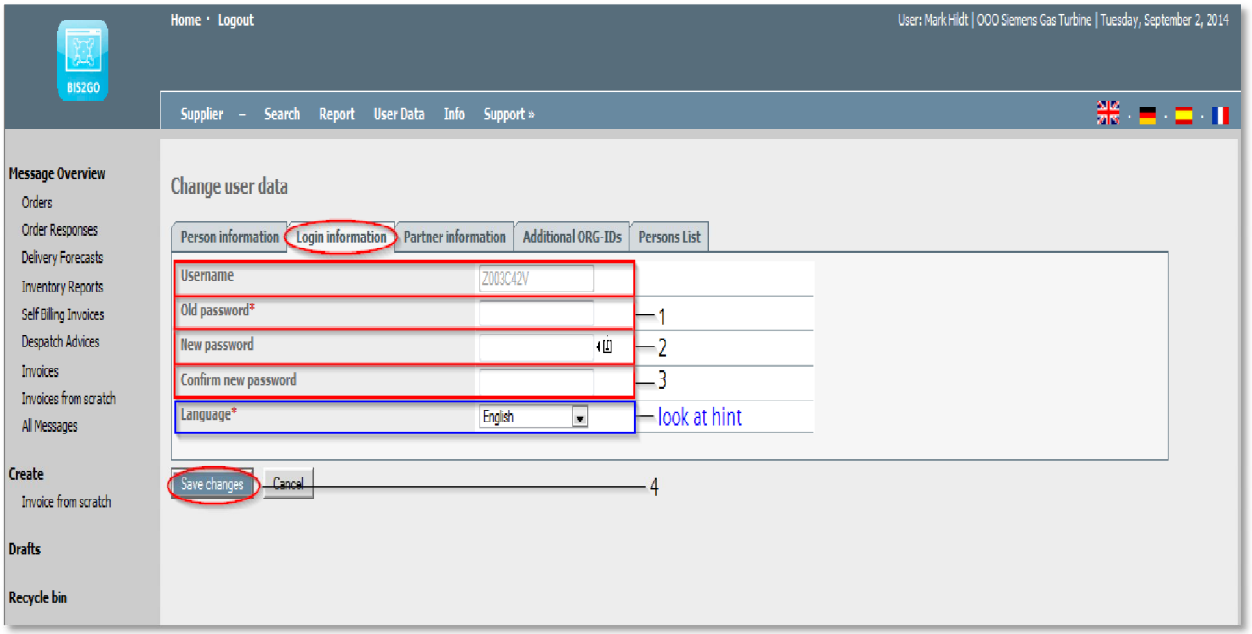
## 3.3.2 Change login information

In the “Login information“ tab you can change your password or the default language.

To change your password, proceed as follows:




1. Enter your old password in the “Old password“ field.
2. Enter your new password in the “New password“ field.
3. Enter your new password again in the “Confirm new password“ field.
4. Click “Save changes“ to take over your changes.

| | |
|---|---|
| | Caution:<br>You need your old password to change the password. |
| | Note:<br>Fields marked with * are mandatory fields. |
| | Note:<br>If you change the language this will affect all the data and the change will be permanent.<br>For the change of language to take effect you need to log out and then log in again. |
| | Tip:<br>Use the button to display explanations for the respective entry field. |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## 3.3.3 Change partner information

If a BIS2GO partner has been assigned several users these can be displayed and changed in the "Partner information" tab. There you can see all the general information for your user account.

The information categories for your user account are:

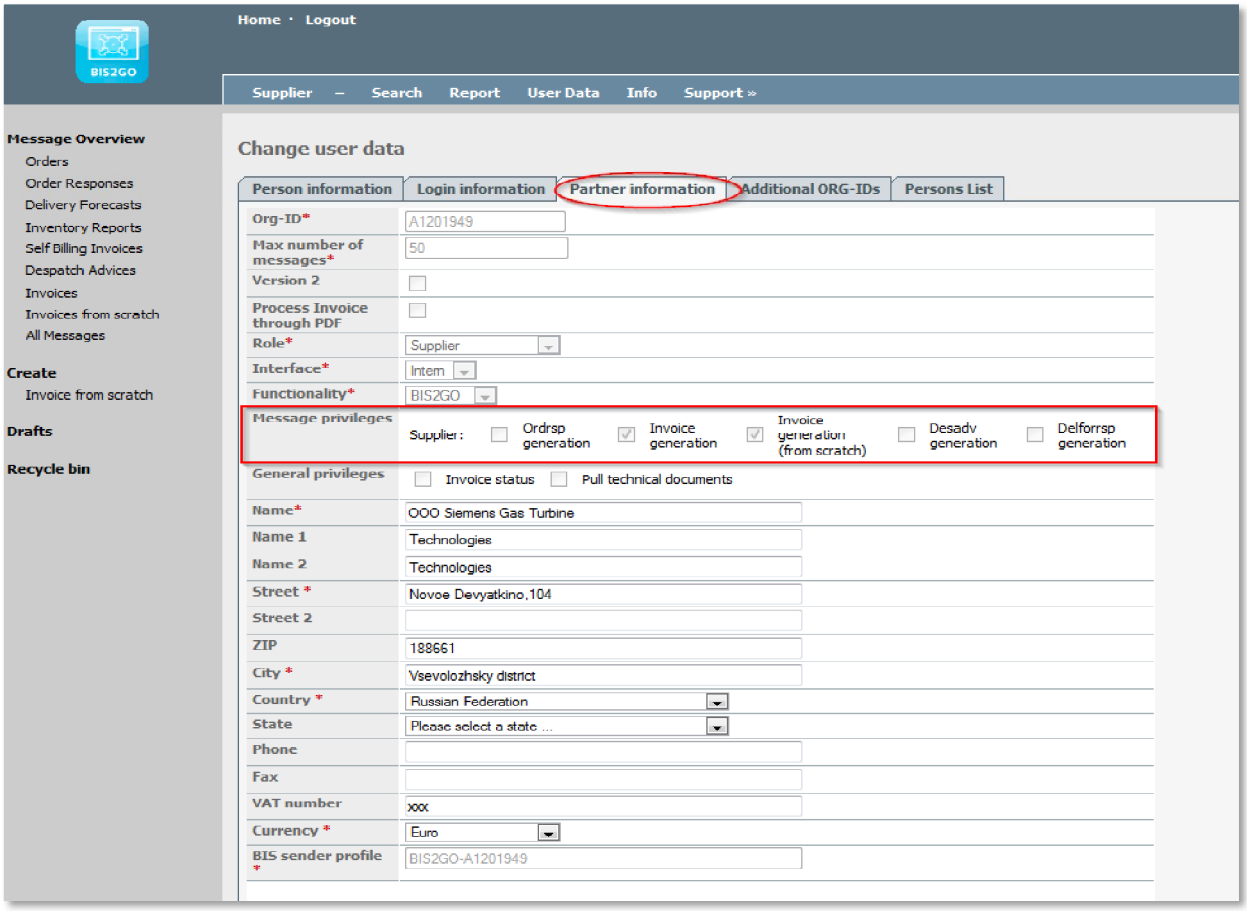
- General partner information
- Invoice information (optional)
- Bank account information
- Configuration

General partner information:

In the General partner information the role assigned to you can be seen in the field titled "Role". Roles differentiate between you as "Supplier", "Customer" or "Supplier + Customer".

Depending on the role you have been assigned you can see whether you are authorized to generate order response messages or invoices in the field titled "Message privileges".

If you do not have the corresponding privileges, you will not see the buttons Order generation, Order response generation, Despatch advice (document name) generation or Invoice generation.

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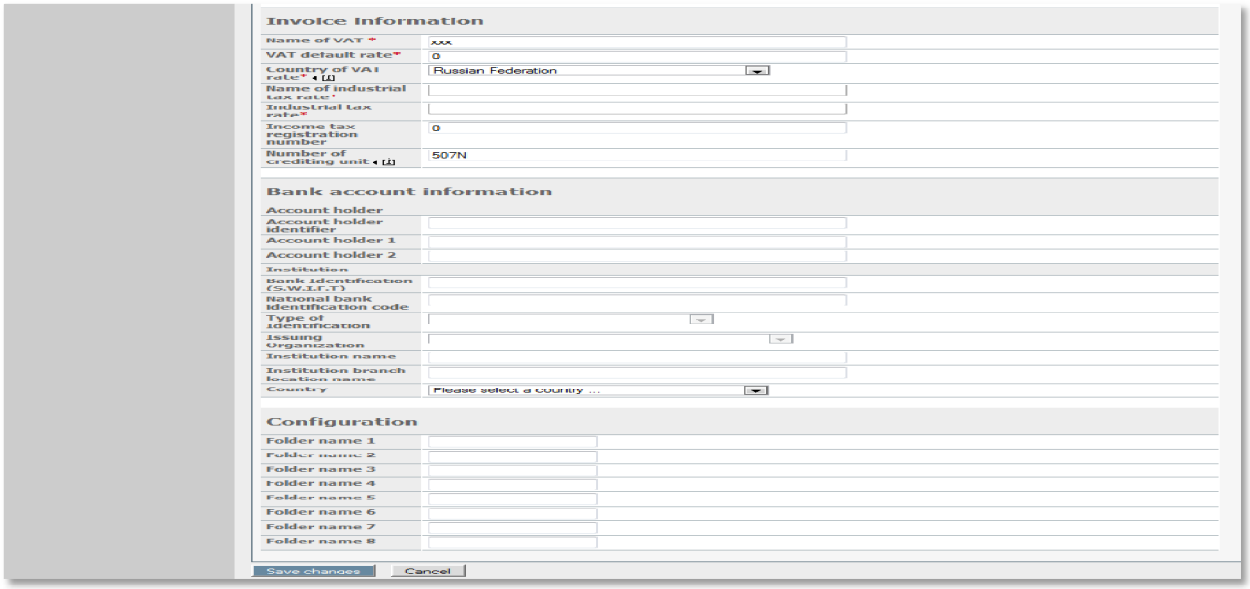
Invoice information (optional):

Prerequisite: You must be authorized to generate invoices.

Only then you will see the “Invoice information“. Here you can make entries related to the invoice.




| | |
|---|---|
| | Caution:<br>Changes in the partner information are not limited to your user account. |
| | Note:<br>Fields marked with * are mandatory fields. |
| | Note:<br>Fields with a grey background can only be changed by the BIS2GO administrator. If you want to change any of these fields please contact the support team (3.5 Contact support team page18). |

## 3.3.4 See additional ORG-IDs

Your ORG-IDs are listed in the tab titled “Additional ORG-IDs“.

Prerequisite: You must have been assigned several ORG-IDs. Please note that Siemens administrators allocate the ORD-IDs.

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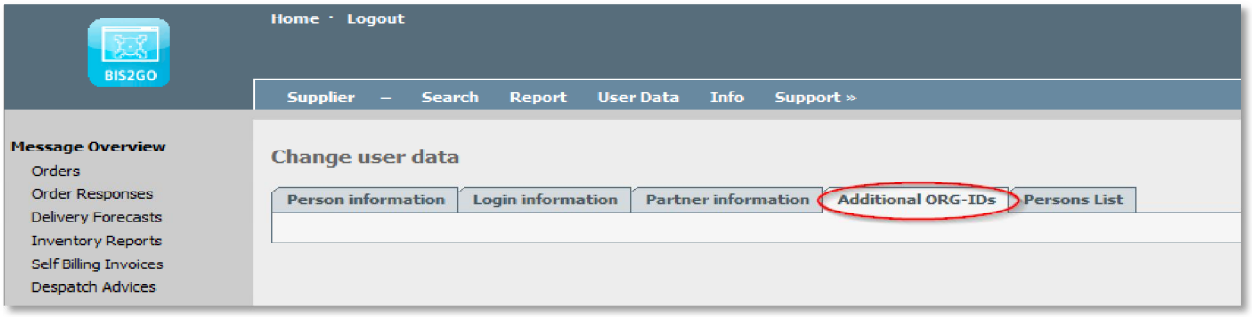


# 3.4 Retrieve information

In menu item “Info“ you can find information about BIS2GO, including:

- BIS2GO user manual
- Web-based training
- Version history

Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
BIS2GO
Supplier (A1201949) – Search Report User Data Info Support »
Message Overview
Message Status Overview

➢ Click “Info“ to get to this section.

# 3.5 Contact support team

In the “Support“ section the members of the support team can be contacted in case of questions or problems.

Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
BIS2GO
Supplier (A1201949) – Search Report User Data Info Support »
EDI Hotline & Contacts
Send E-Mail
Message Overview
Message Status Overview

EDI Hotline & Contacts

Here you are forwarded to the EDI page and see the contact persons and their phone numbers.

Send E-Mail

Here you see the email address of the EDI support and can contact the support team in writing.

# 3.6 Select language

In the upper right-hand corner of the menu bar you can change the language.

You can select the following languages:

- German
- English
- Spanish
- French

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Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
BIS2GO
Supplier (A1201949) – Search Report User Data Info Support »
Message Overview
Message Status Overview

| | |
|---|---|
| | Note:<br>After the next login the system will return to the default language defined in the User data“ in the “Login information“ tab. |

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# 4 Message administration

In the current version you can receive the following messages:

- Orders
- Order changes
- Delivery schedule
- Inventory reports
- Credit advice
- Delivery note
- Invoices

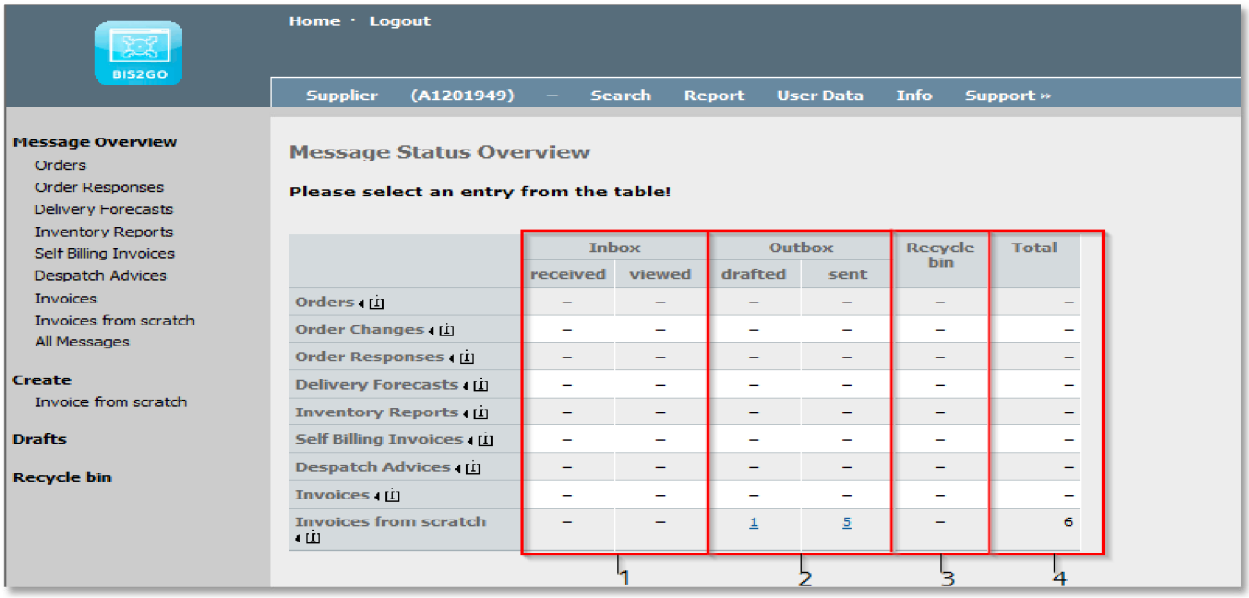
In the current version the following messages can be created:

- Order responses
- Invoices
- Invoices from scratch

## 4.1 Message status overview

After the BIS2GO login you are automatically forwarded to the “Message Status Overview“- window. There you can see how many messages are available for the individual message types.

The message status overview is structured into four sections.




| Sections | Explanation |
|---|---|
| 1.Inbox | New messages can be found in the folder titled “received”.<br>After a new message has been opened, it is automatically moved to the folder titled “viewed“. |
| 2.Outbox | New drafted messages can be found in the folder titled “drafted“. |

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| | |
|---|---|
| | Messages which have already been sent can be found in the folder titled “sent“. |
| 3.Recycle bin | Messages which are no longer needed can be moved to the “recycle bin“ folder. |
| | The messages in the recycle bin will be deleted by the system after 3 months! |
| 4.Total | Shows the total number of messages for the respective message type. |

| | |
|---|---|
| | Tip:<br>With the button you can display explanations regarding the message types. |

# 4.2 Message overview

On the left side of the message status overview you can see the “Message overview” which can be used for quickly navigating to the individual sections. There you can go to the individual message types.

To get to a message type’s “Message overview“ you proceed as follows:

- Click the desired message type in the “Message overview“ on the left side to get to the message overview of the corresponding message type.

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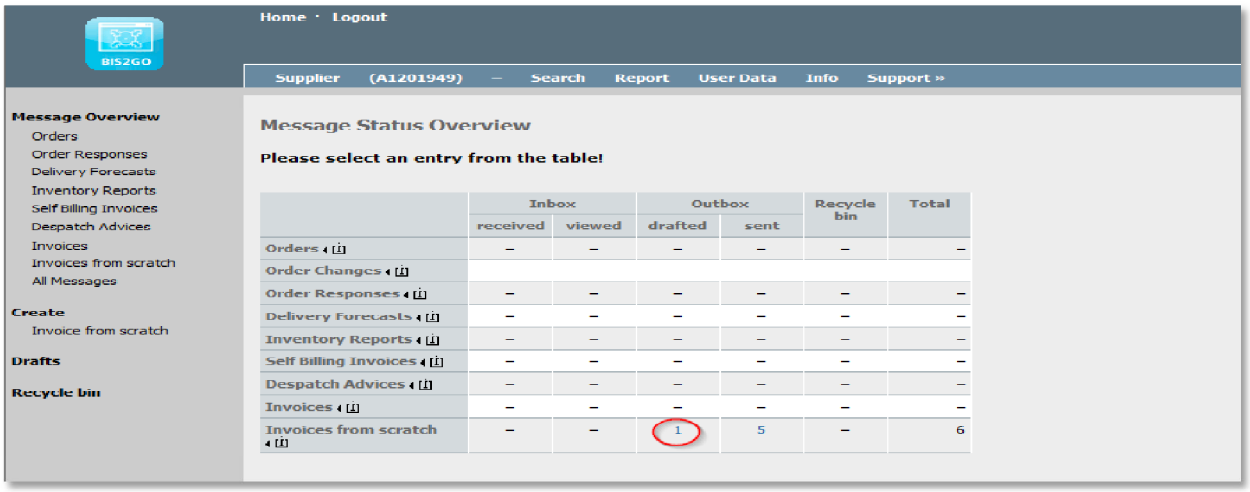
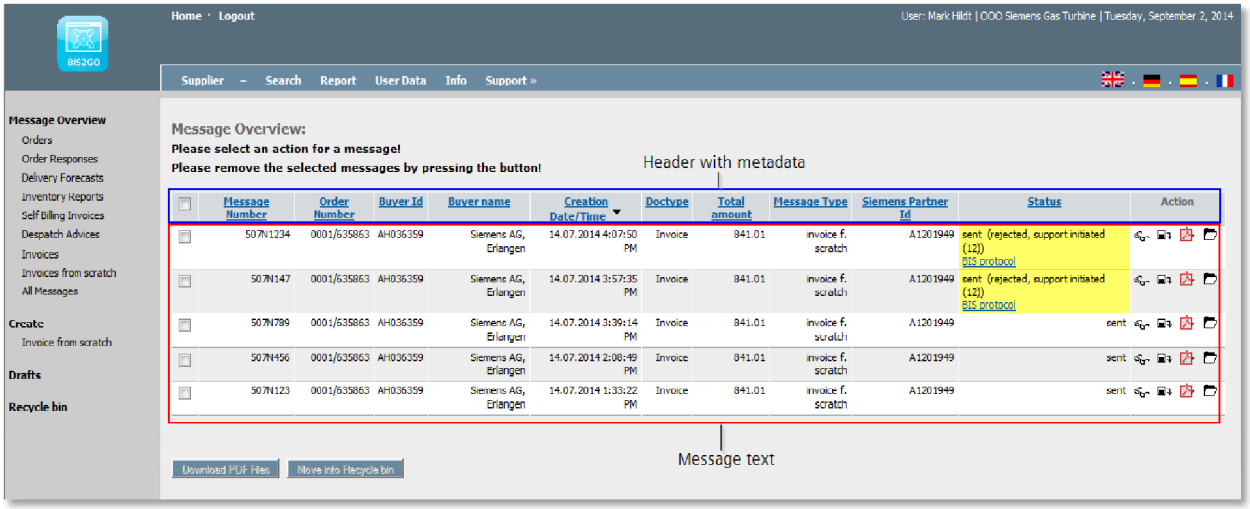
Alternative:




- Click one of the figures in the message status overview to get to the message overview of the selected message type.

- ✓ Now you are in a message type's message overview.

In the "Message overview" the different messages are listed in an overview table. For every message the lines show certain message contents. These contents are assigned to the meta data in the header line.


Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview:
Please select an action for a message!
Please remove the selected messages by pressing the button!
Header with metadata
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Doctype
Total amount
Message Type
Siemens Partner Id
Status
Action
507N1234 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 4:07:50 PM Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N147 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:57:35 PM Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N789 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:39:14 PM Invoice 841.01 invoice f. scratch A1201949 sent
507N456 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 2:08:49 PM Invoice 841.01 invoice f. scratch A1201949 sent
507N123 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:33:22 PM Invoice 841.01 invoice f. scratch A1201949 sent
Message text
Download PDF files
Move into Recycle bin

The message overview also provides the possibility to move messages.

Messages can be moved as follows:

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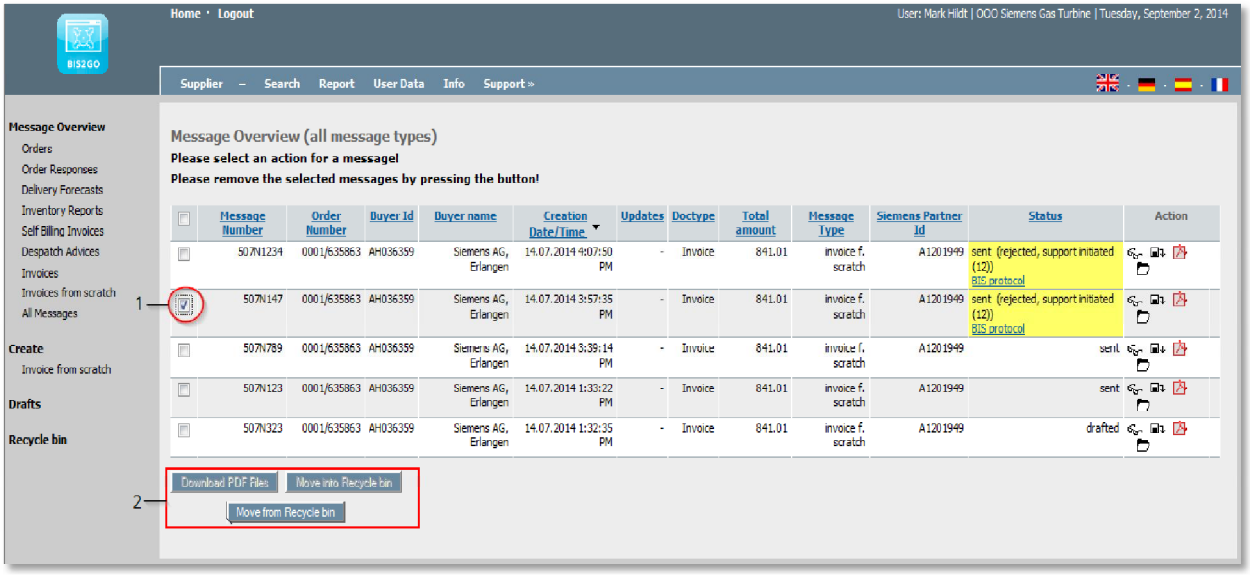
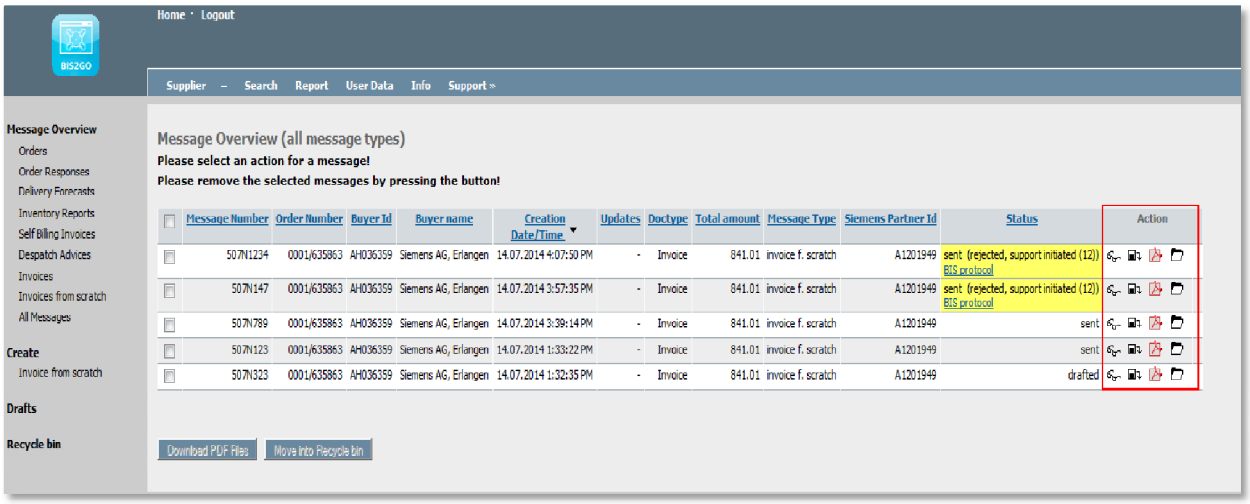

Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Tuesday, September 2, 2014
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview (all message types)
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Updates
Doctype
Total amount
Message Type
Siemens Partner Id
Status
Action
507N1234 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 4:07:50 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N147 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:57:35 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N789 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:39:14 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N123 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:33:22 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N323 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:32:35 PM - Invoice 841.01 invoice f. scratch A1201949 drafted
1
2
Download PDF Files
Move into Recycle bin
Move from Recycle bin

1. Mark the message to be moved by ticking the box to the left of the message.
2. Click one of the buttons to move the selected message.

| Buttons | Explanation |
|---|---|
| "Move into received" | Messages received and already read are moved into the received folder. |
| "Move from recycle Bin" | Received messages are moved into the "viewed" folder.<br>Drafted messages are moved into the "sent" or "drafted" folder. |
| "Move into recycle bin" | Here the messages are always moved into the "Recycle bin". |

# 4.3 Message actions

The "Message overview" contains a number of actions which are displayed through small symbols.


Home · Logout
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview (all message types)
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Updates
Doctype
Total amount
Message Type
Siemens Partner Id
Status
Action
507N1234 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 4:07:50 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N147 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:57:35 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N789 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:39:14 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N123 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:33:22 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N323 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:32:35 PM - Invoice 841.01 invoice f. scratch A1201949 drafted
Download PDF Files
Move into Recycle bin

| Symbols | Action |
|---|---|
| IT creates business value | |

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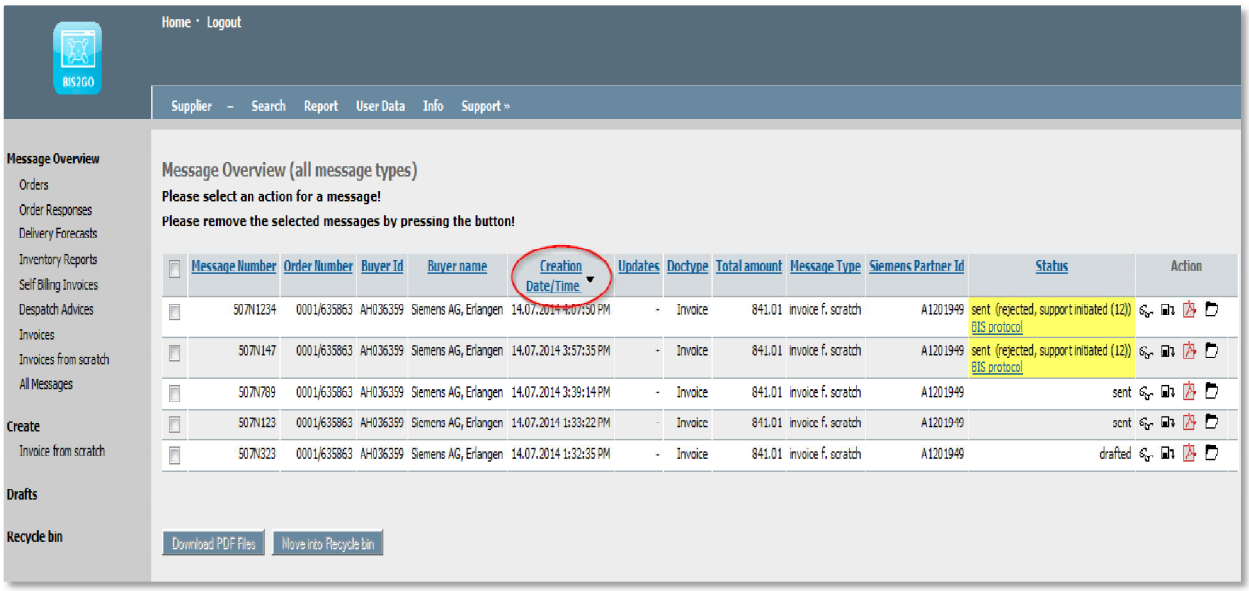
| | |
|---|---|
| ; | Sort descending / sort ascending |
| | Details |
| | Download message in XML format |
| | Display message as PDF prepared for printing |
| | Display business transaction |

| | |
|---|---|
| | Note:<br>The following sections explain the individual actions in more detail. |

## 4.3.1 Sort Message overview

The “Message Overview“ can be sorted by all meta data in the header line. The meta data used for sorting has a small arrow symbol beside the name. The arrow's direction shows whether the sorting order is descending or ascending.


Home · Logout
BIS2GO
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview (all message types)
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Updates
Doctype
Total amount
Message Type
Siemens Partner Id
Status
Action
507N1234 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 4:07:50 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N147 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:57:35 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N789 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:39:14 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N123 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:33:22 PM - Invoice 841.01 invoice f. scratch A1201949 sent
507N323 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 1:32:35 PM - Invoice 841.01 invoice f. scratch A1201949 drafted
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➢ Click one of the fields underlined in blue“ to sort the message overview.

## 4.3.2 Show details

The glasses symbol in the “Message Overview” takes you to a message’s “Details”.

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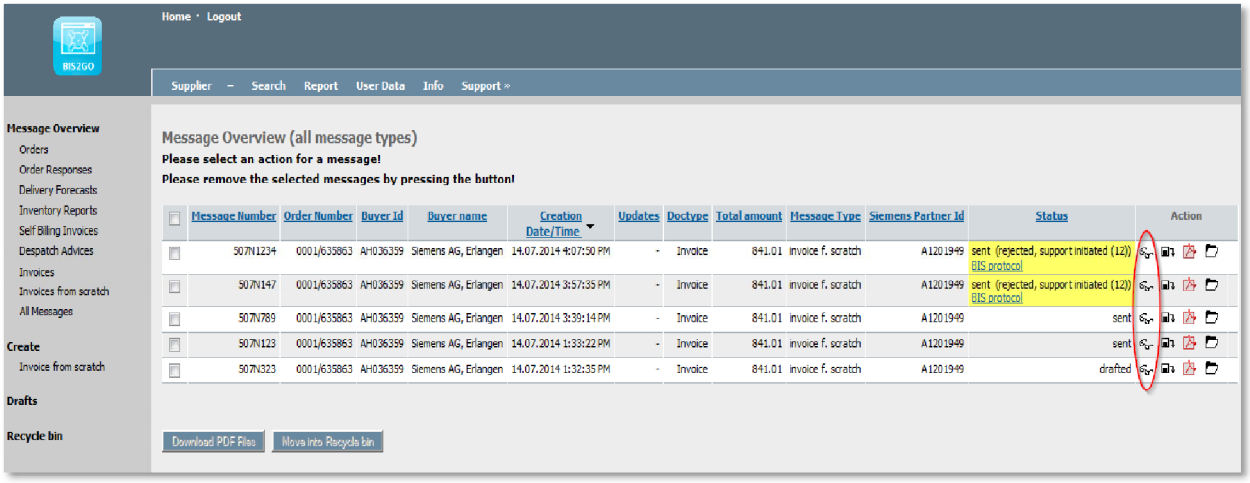
Home · Logout
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview (all message types)
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number | Order Number | Buyer Id | Buyer name | Creation Date/Time | Updates | Doctype | Total amount | Message Type | Siemens Partner Id | Status | Action
507N1234 | 0001/635863 | AH036359 | Siemens AG, Erlangen | 14.07.2014 4:07:50 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent (rejected, support initiated (12)) BIS protocol
507N147 | 0001/635863 | AH036359 | Siemens AG, Erlangen | 14.07.2014 3:57:35 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent (rejected, support initiated (12)) BIS protocol
507N789 | 0001/635863 | AH036359 | Siemens AG, Erlangen | 14.07.2014 3:39:14 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent
507N123 | 0001/635863 | AH036359 | Siemens AG, Erlangen | 14.07.2014 1:33:22 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent
507N323 | 0001/635863 | AH036359 | Siemens AG, Erlangen | 14.07.2014 1:32:35 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | drafted
Download PDF Files
Move into Recycle bin

➢ Click to access the “Details“.

The following table lists all message types and the associated tabs in the details:

| Tabs / Message type | Header data | Item data | General data | Partner addresses | Header texts | Charges/ discounts | Package items |
|---|---|---|---|---|---|---|---|
| Order | X | X | X | | | | |
| Order change | X | X | X | | | | |
| Order response | X | X | X | | | X | |
| Delivery forecast | X | X | X | | | | |
| Inventory report | X | X | | | | | |
| Invoice display or Self-billing invoice | X | X | X | X | X | X | X |

Note:

The message's details are structured into different tabs depending on the message type.

### 4.3.2.1 Message tabs in the detail view

The next sections describe the tabs in a message's details.

1) Header Data

The “Header Data“ contains the most important message data.

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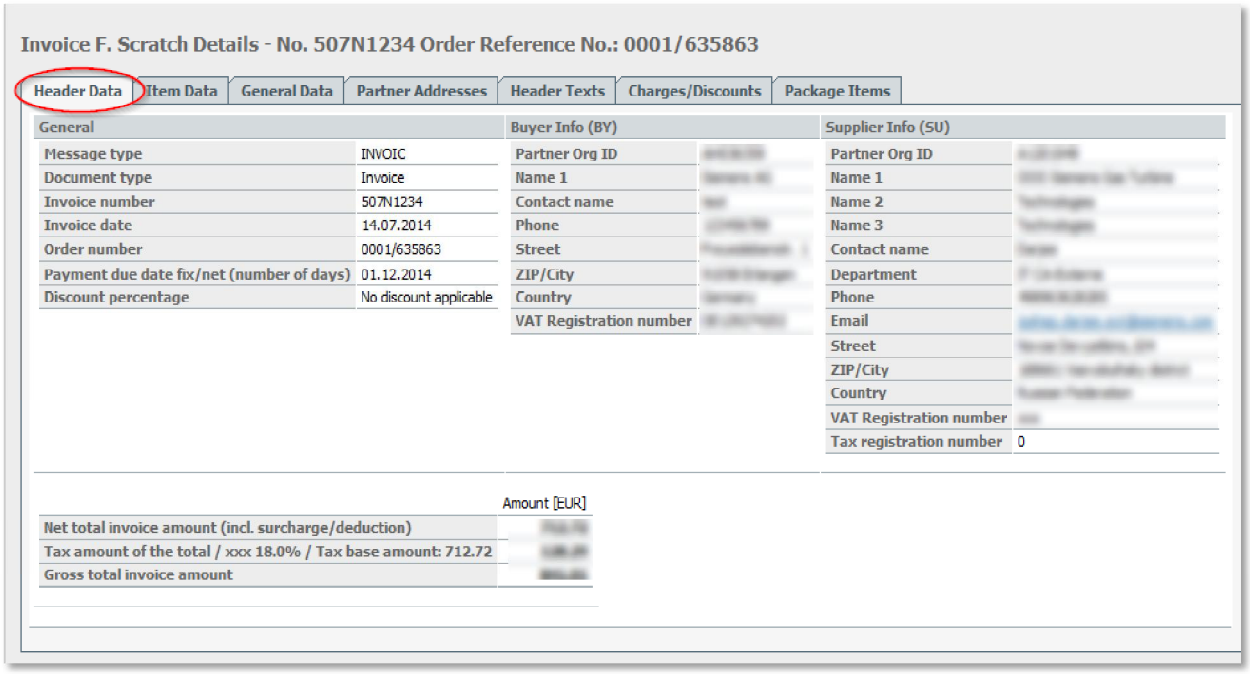
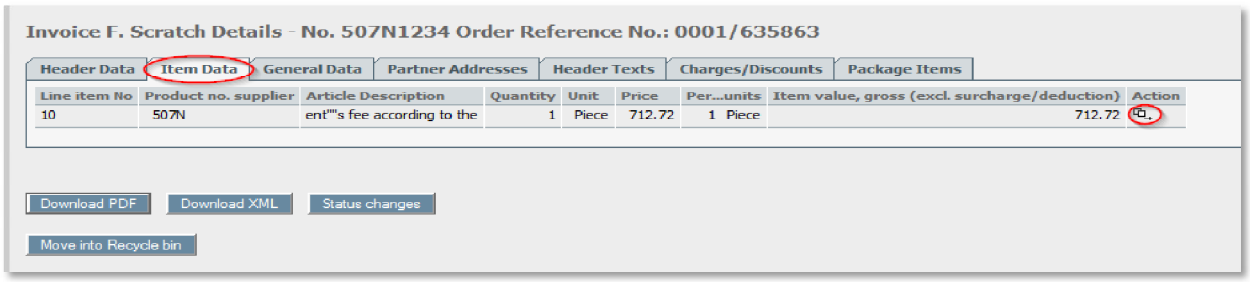



## 2) Item Data

The “Item Data“ contains the overview of the individual items. In this overview you can display further item details.




➢ Click to see the item details.

| | |
|---|---|
| | Note:<br>The item details are described in more detail in chapter 5.2.1 Tabs in the order response with changes page37. |

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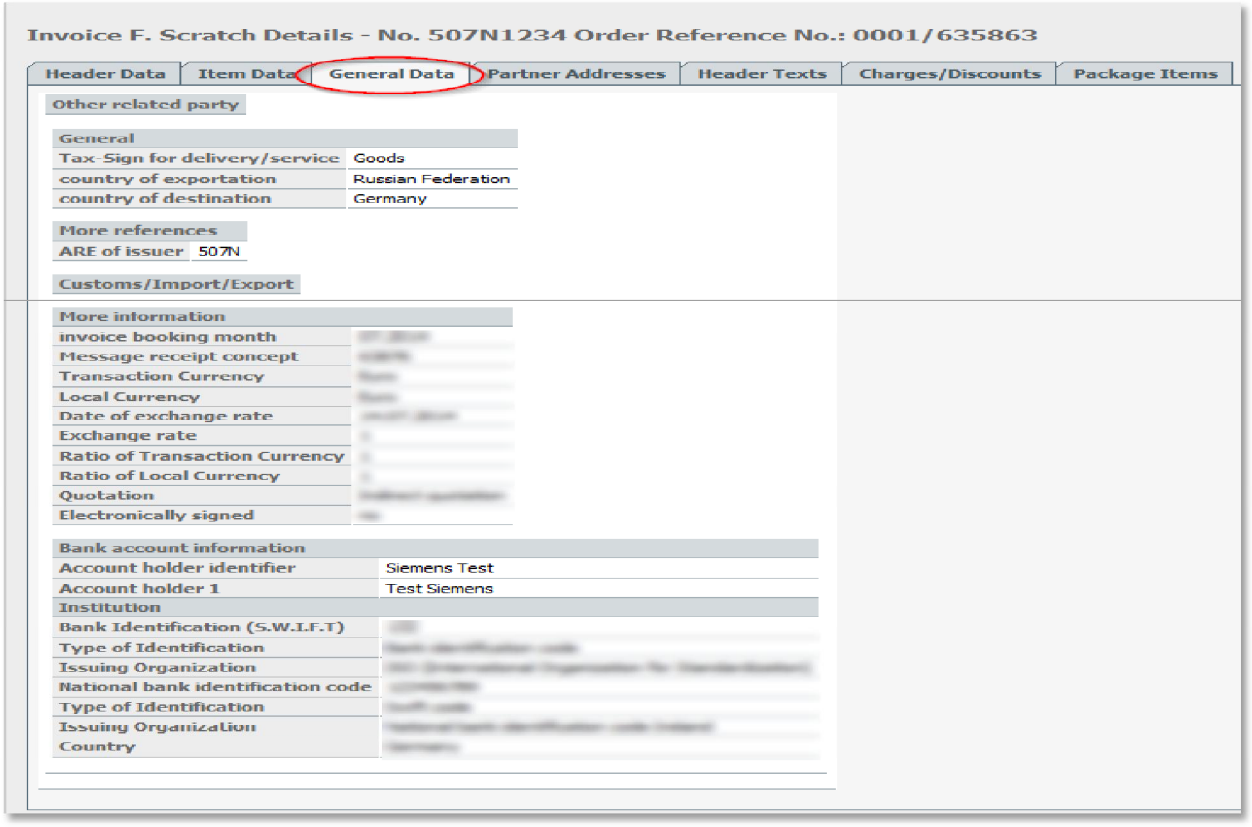
3) General Data

The “General Data“ tab contains additional message data.

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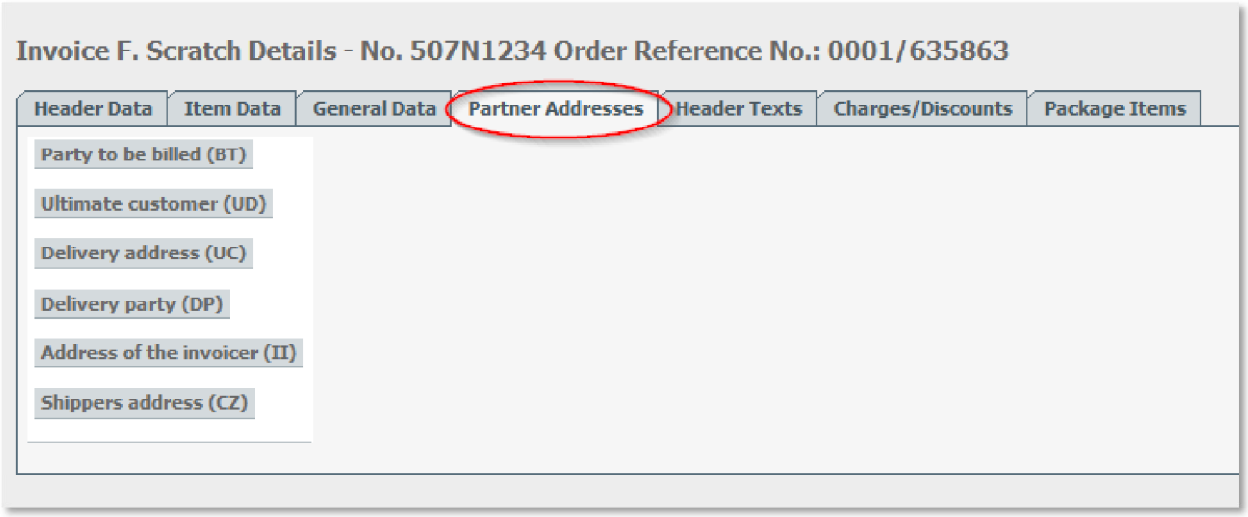
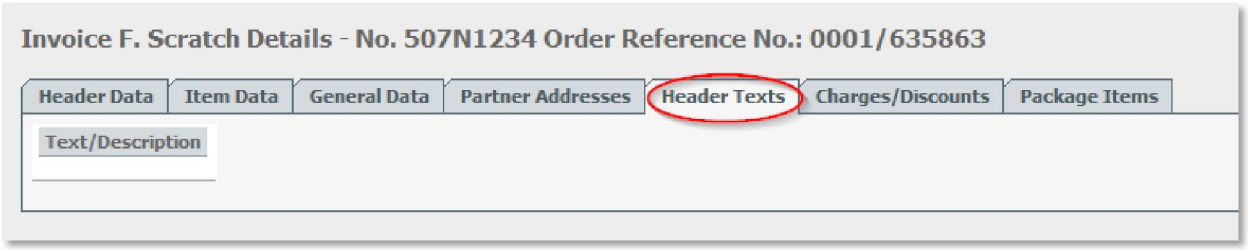
4) Partner Addresses

The “Partner Addresses“ show all the important addresses related to an invoice and display them in a structured way.



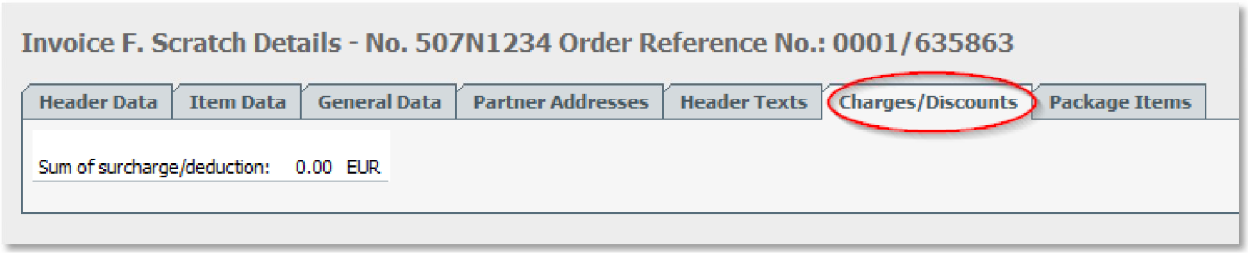

5) Header Texts

The “Header Texts” contain customer specific information about the header texts in the invoices.




6) Charges/ Discounts

In the “Charges/Discounts“ tab you can find information about deductions and surcharges.

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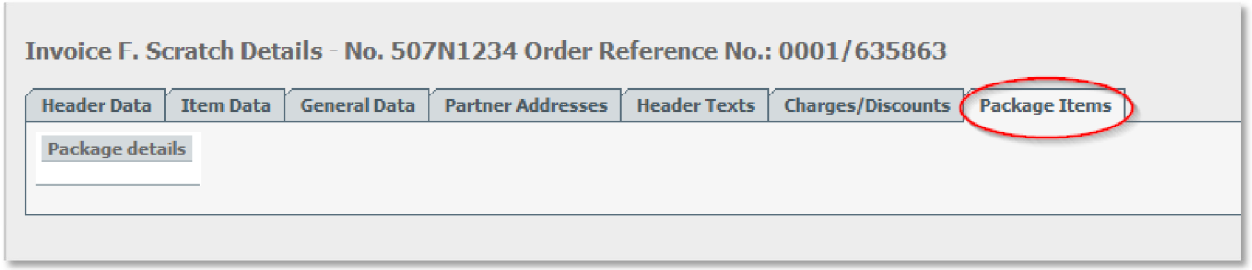
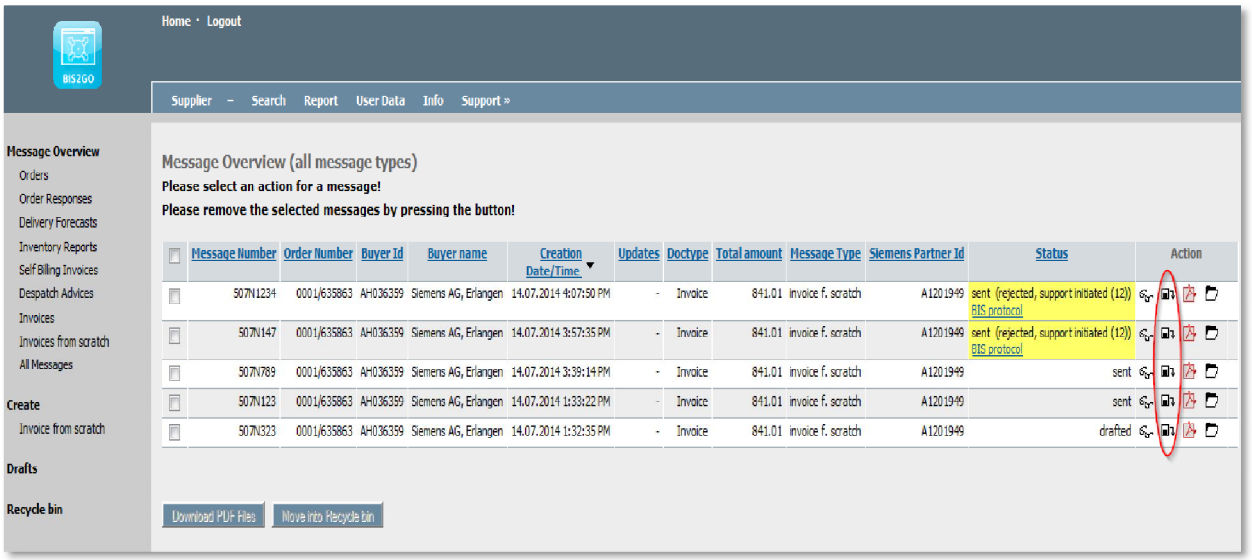
7) Package Items

The “Package Items” tab contains additional information on a shipment’s packaging, size and weight.




## 4.3.3 XML download

In the “Message Overview” you can download a message in “DIN5XML format“.


Home · Logout
BIS2GO
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
Message Overview (all message types)
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number | Order Number | Buyer Id | Buyer name | Creation Date/Time | Updates | Doctype | Total amount | Message Type | Siemens Partner Id | Status | Action
507N1234 | 0001/635863 | AH036399 | Siemens AG, Erlangen | 14.07.2014 4:07:50 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent (rejected, support initiated (12)) BIS protocol
507N147 | 0001/635863 | AH036399 | Siemens AG, Erlangen | 14.07.2014 3:57:35 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent (rejected, support initiated (12)) BIS protocol
507N789 | 0001/635863 | AH036399 | Siemens AG, Erlangen | 14.07.2014 3:39:14 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent
507N123 | 0001/635863 | AH036399 | Siemens AG, Erlangen | 14.07.2014 1:33:22 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | sent
507N323 | 0001/635863 | AH036399 | Siemens AG, Erlangen | 14.07.2014 1:32:35 PM | - | Invoice | 841.01 | invoice f. scratch | A1201949 | drafted
Download PDF files
Move into Recycle bin

➢ Click to download a message in “XML format”.

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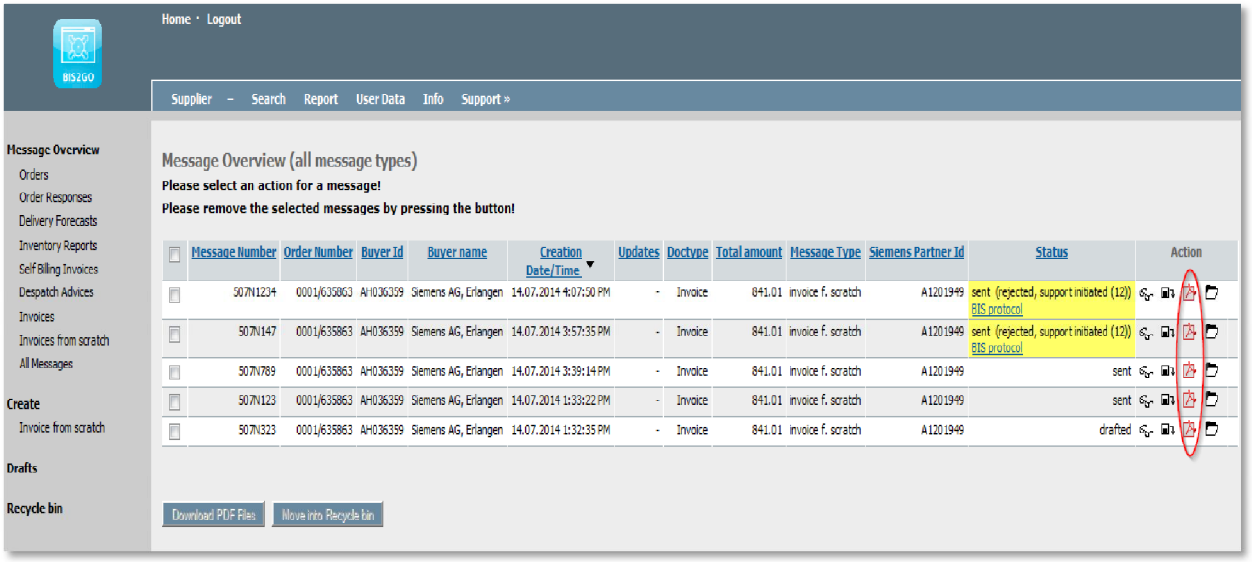
## 4.3.4 Show PDF

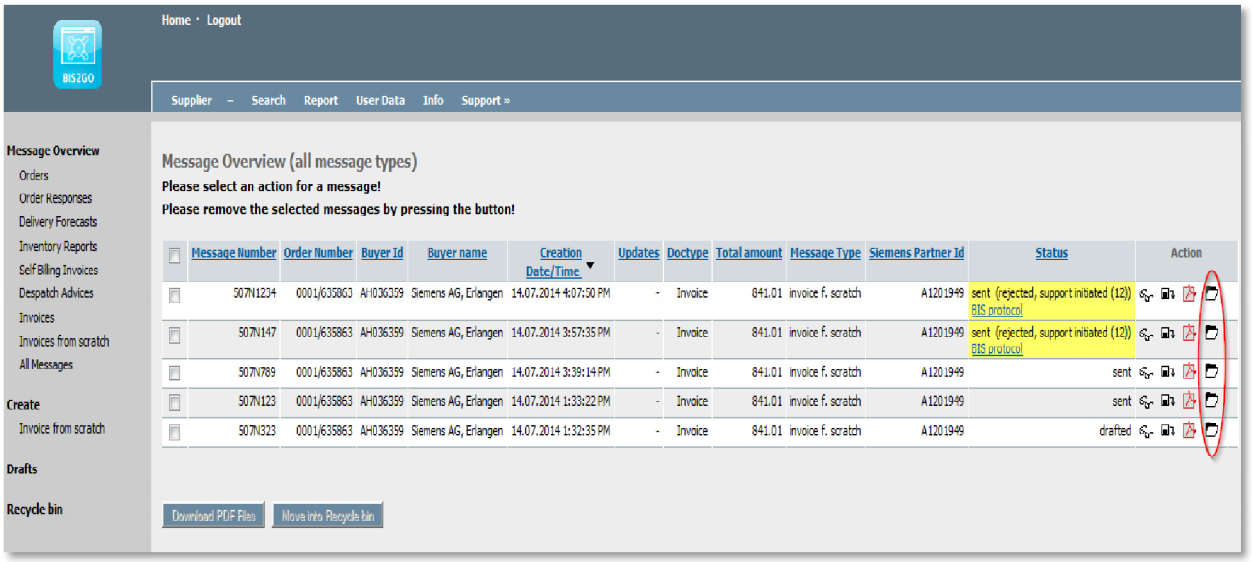
In the “Message Overview“ you can show a message in “PDF format“ prepared for printing, print it and save it. The message is opened in a new window.




➢ Click to display a message in “PDF format“.

## 4.3.5 Show business transaction

In the “Message Overview“ you can view the “business transaction“ for all messages involved. Here, the overview shows all messages (i.e. all message types) with the same order or reference number.




➢ Click to view a message’s “business transaction“.

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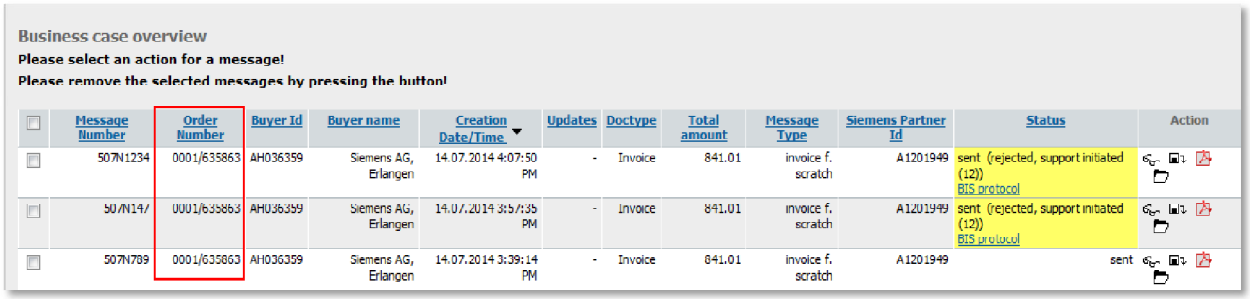

Business case overview
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Updates
Doctype
Total amount
Message Type
Siemens Partner Id
Status
Action
507N1234 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 4:07:50 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N147 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:57:35 PM - Invoice 841.01 invoice f. scratch A1201949 sent (rejected, support initiated (12)) BIS protocol
507N789 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 3:39:14 PM - Invoice 841.01 invoice f. scratch A1201949 sent

✓ This view provides you with an overview of the messages related to one transaction and facilitates navigation.

# 4.4 Call up message status changes

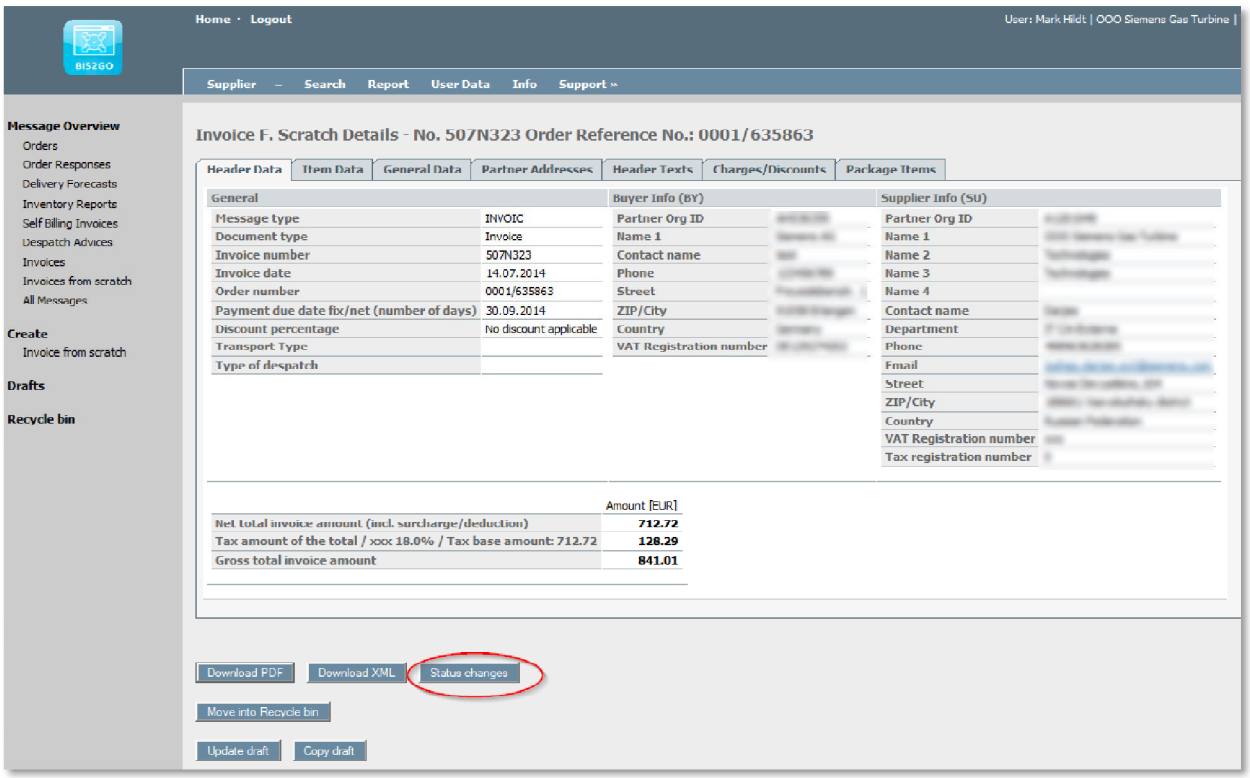
A message's status changes can be traced in the message action "Details".

Here you can see information such as:

- When was the message received
- When was the message viewed
- When was the message moved to the recycle bin (i.e. status completed)

To call up the message status changes you proceed as follows:

Prerequisite: You must be in a message's "Details".




➢ Click the "Status changes" button to call up the message status changes.

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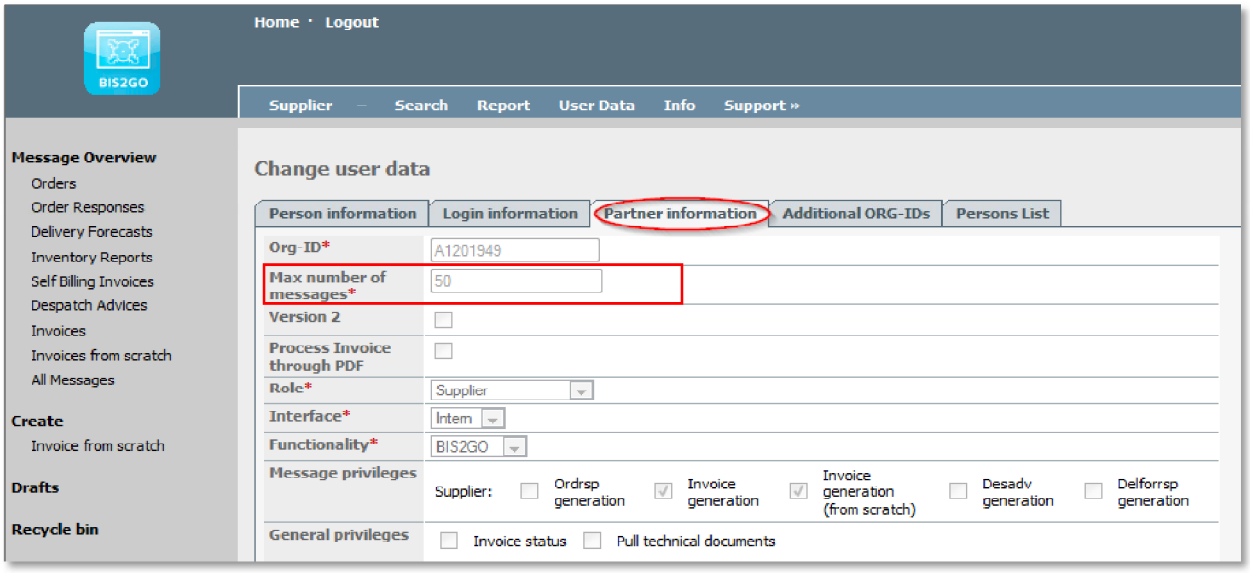
# 4.5 Restriction of saved messages

You can see the maximum quantity of your message store in the administration “User data“ in the tab titled “Partner information“.




If there are too many messages no more actions can be performed in the following folders:

- Orders
- Order responses
- Delivery forecasts
- Inventory reports
- Invoices

The following warning informs you about a restriction of the functionality.

Restriction of Functionality!
the maximum allowable amount of messages for the system has been exceeded
therefore the available functionality of the application has been restricted
please move messages which are no longer required into the short time archive
the complete functionality of the application will be available afterwards
Maximum allowable amount of messages: 10
Current amount of messages: 19

➢ Move some of your messages to the recycle bin.

✓ The complete functionality will be restored.

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Note:

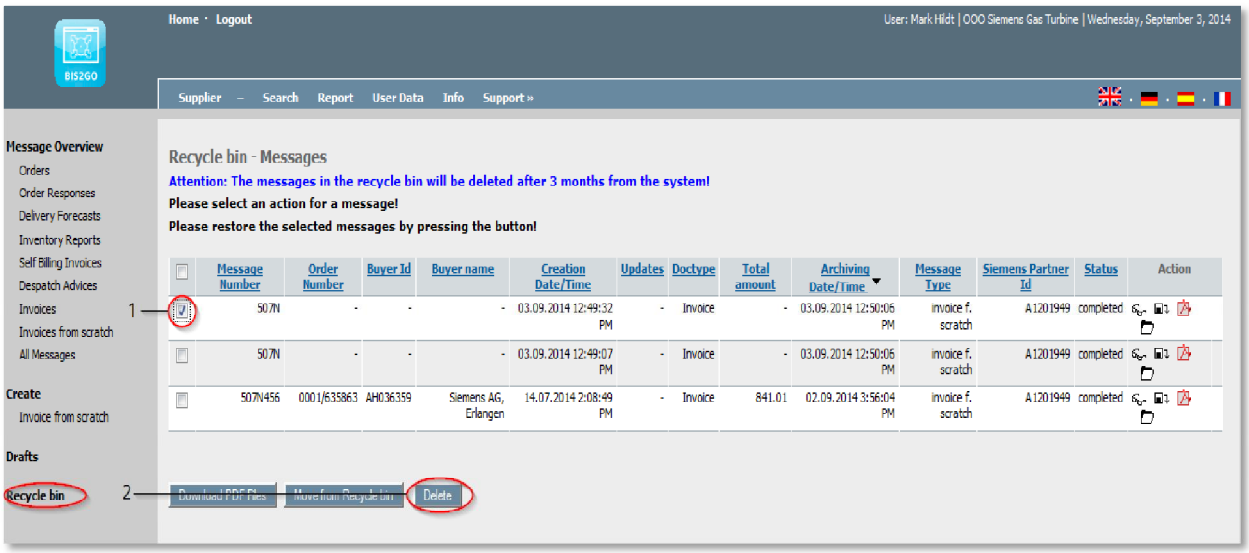
The message store is limited to a maximum number of messages for every partner. You cannot change this value yourself.

# 4.6 Delete messages

In the “Recycle bin“ you can delete messages.

Prerequisite: There must be a message in the recycle bin.

To move a message into the recycle bin (see 4.2 Message overview page 21).


Home · Logout
User: Mark Hildt | OOO Siemens Gas Turbine | Wednesday, September 3, 2014
BIS2GO
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Recycle bin
1
2
Recycle bin - Messages
Attention: The messages in the recycle bin will be deleted after 3 months from the system!
Please select an action for a message!
Please restore the selected messages by pressing the button!
Message Number
Order Number
Buyer Id
Buyer name
Creation Date/Time
Updates
Doctype
Total amount
Archiving Date/Time
Message Type
Siemens Partner Id
Status
Action
507N - - - 03.09.2014 12:49:32 PM - Invoice - 03.09.2014 12:50:06 PM invoice f. scratch A1201949 completed
507N - - - 03.09.2014 12:49:07 PM - Invoice - 03.09.2014 12:50:06 PM invoice f. scratch A1201949 completed
507N456 0001/635863 AH036359 Siemens AG, Erlangen 14.07.2014 2:08:49 PM - Invoice 841.01 02.09.2014 3:56:04 PM invoice f. scratch A1201949 completed
Download PDF Files
Move from Recycle Bin
Delete

1. Tick the check box on the left side to mark the message.
2. Click “Delete“ for the final deletion of the message.

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# 5 Confirm order

Prerequisite: To generate an order response you must be in an “Order’s“ “Details“ (see 4.3.2 Show details page 24).

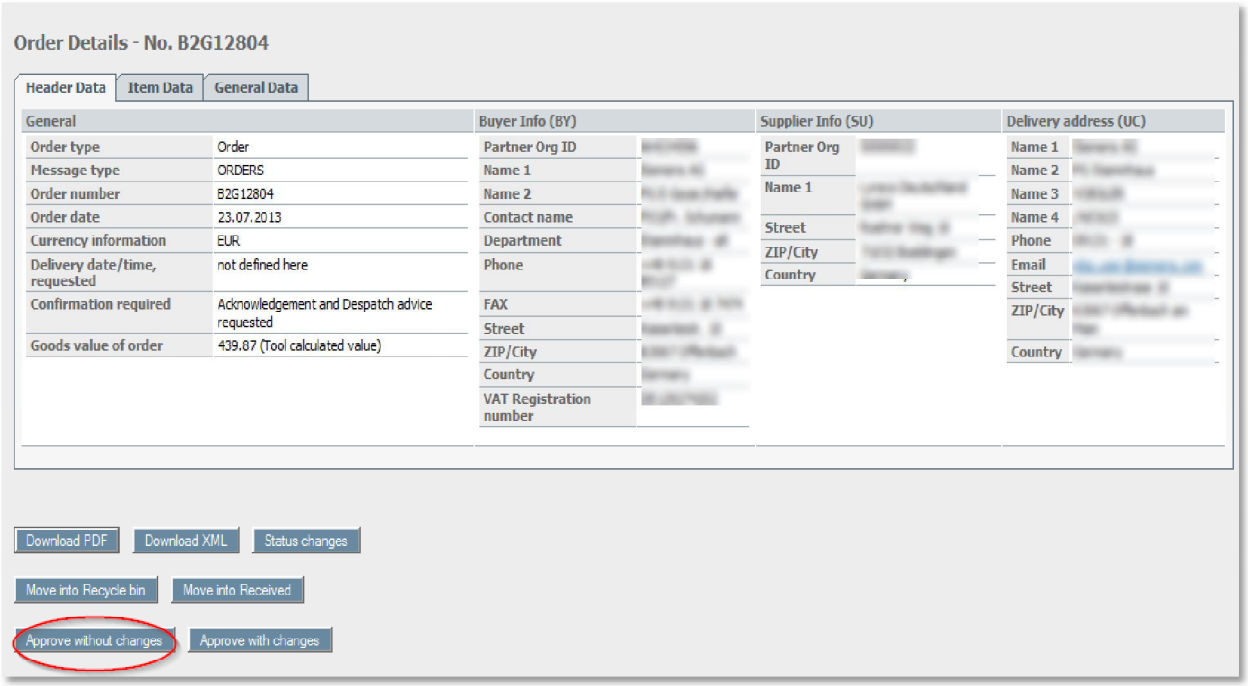
There you can send an “Order response without change“ or an “Order response with change“.

| | |
|---|---|
| | Note:<br>You can only confirm orders if you have the corresponding authorizations.<br>In the “User data“ in the “Partner information“ tab you can see whether you have them or not. |

## 5.1 Order response without change

To generate an “Order response without change“ you proceed as follows:

Prerequisite: You must be in an “Order’s” message action “Details“.




➢ Click “Approve without changes“.

✓ You will see a screen in which you need to enter an order response number. The entry of this number is meant for your personal administration.

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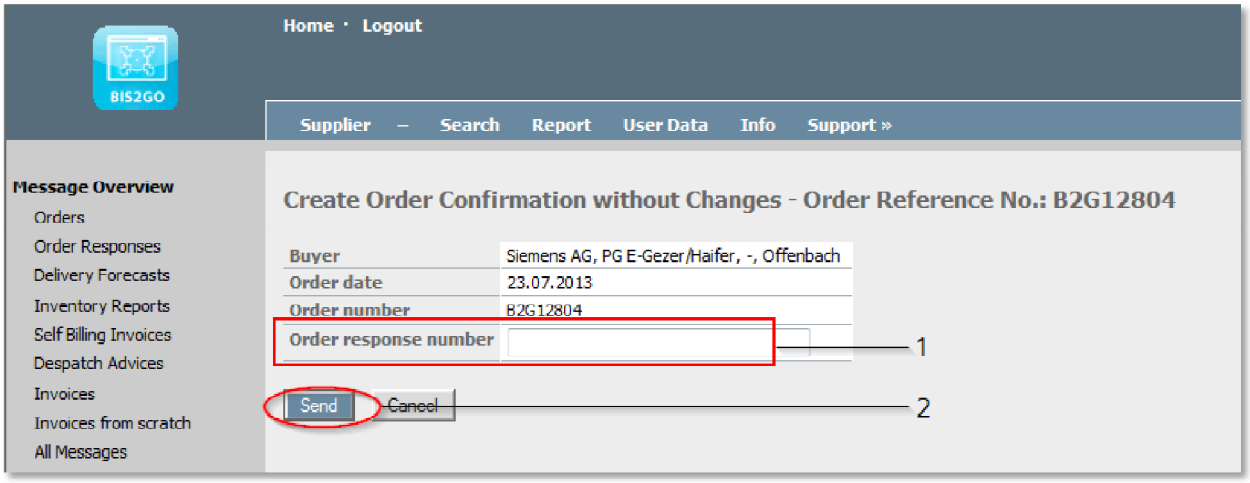



1. Click the “Order response number“ field and enter a number.
2. Click “Send“ to send the order response.

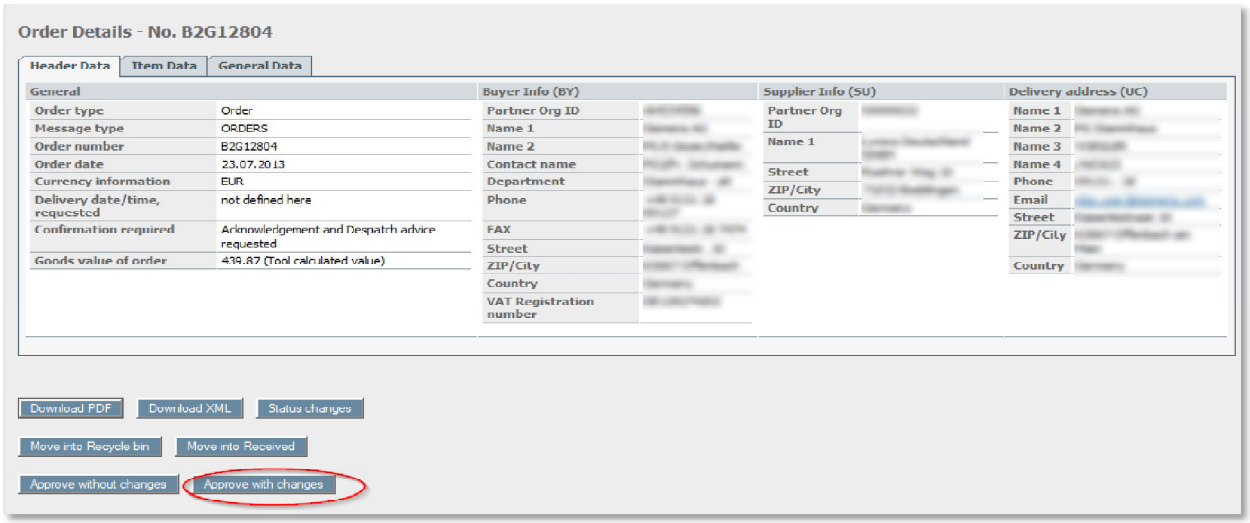
✓ You can find the order response you just sent in the Order response“ folder with status “sent“.

| | |
|---|---|
| | Note:<br>The order response number can be freely selected and can also contain letters. With this number the order responses can be found more easily later on. |

## 5.2 Order response with change

An “Order response with changes“ is required if the delivery is split up into partial deliveries, or if the delivery shall be rescheduled to a later date.

Prerequisite: You must be in an “Order’s” message action “Details“.




➢ Click “Approve with changes“.

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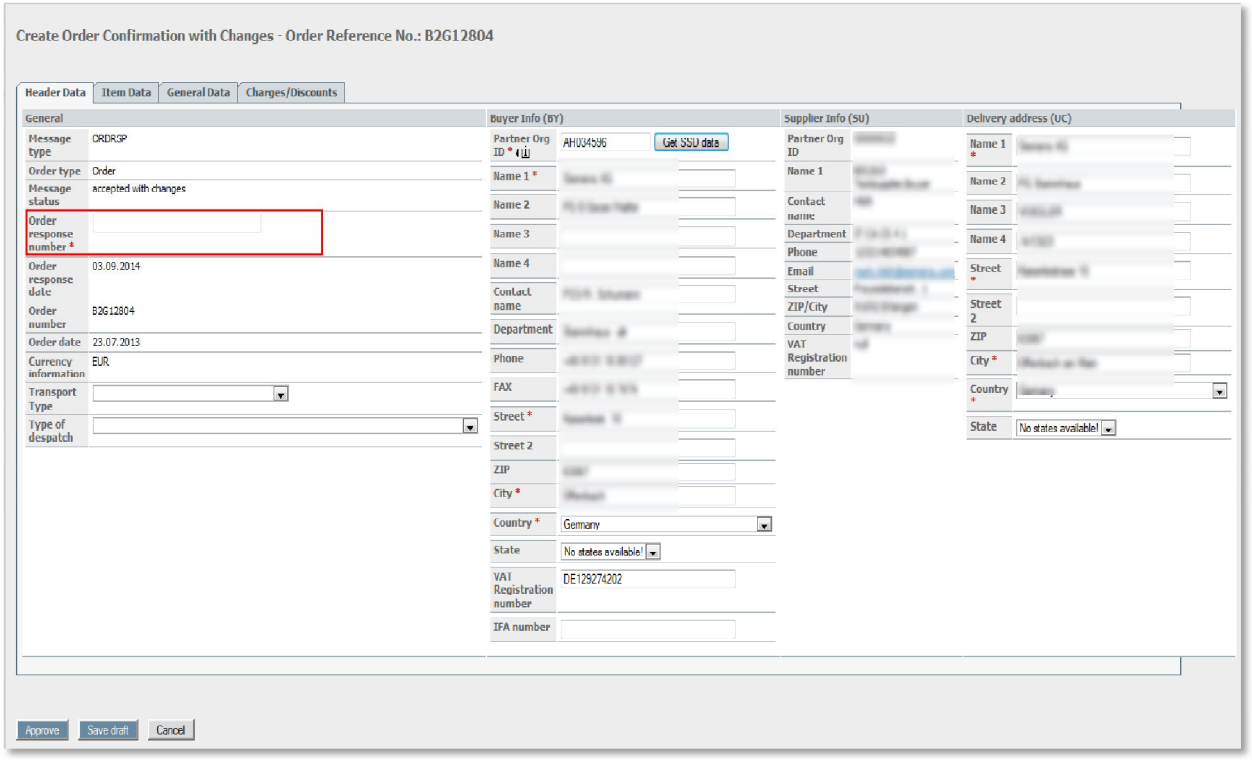
✓ You will see a screen in which you need to enter an order response number. The entry of this number serves for your own administration.




➢ Click the “Order response number“ field and enter a number.

| | |
|---|---|
| | Note:<br>The order response number can be freely selected and can also contain letters. With this number the order responses can be found more easily later on. |
| | Note:<br>Fields marked with * are mandatory fields. |
| | Note:<br>Before you approve an order you should make the desired changes. You can navigate through the individual tabs (“Header data“, “Item data“, “General data“, “Charges/discounts“) and make changes. |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## 5.2.1 Tabs in the order response with changes

The following sections describe the tabs of the order response with changes.

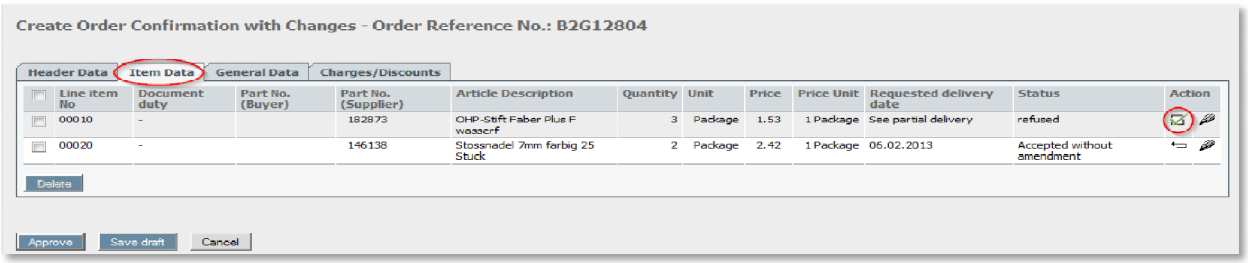
1) Item data

In the “Item data“ you can make changes at item level. Here you can generally refuse an item, or make changes that shall be restricted to one item only.

- Click to refuse an item.

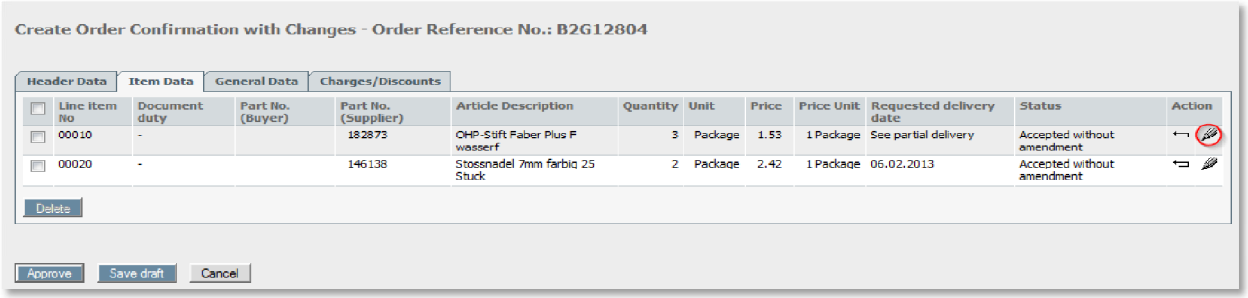
✓ The item will be marked as “refused“.

You can reverse the change at any time.




- Click to accept the item.

You can also edit an item. Here you can edit the “Additional Information“, “Charges/Discounts“ and “Partial deliveries“ for every item.




- Click to edit the item.

✓ Now you are at the order response's item level.

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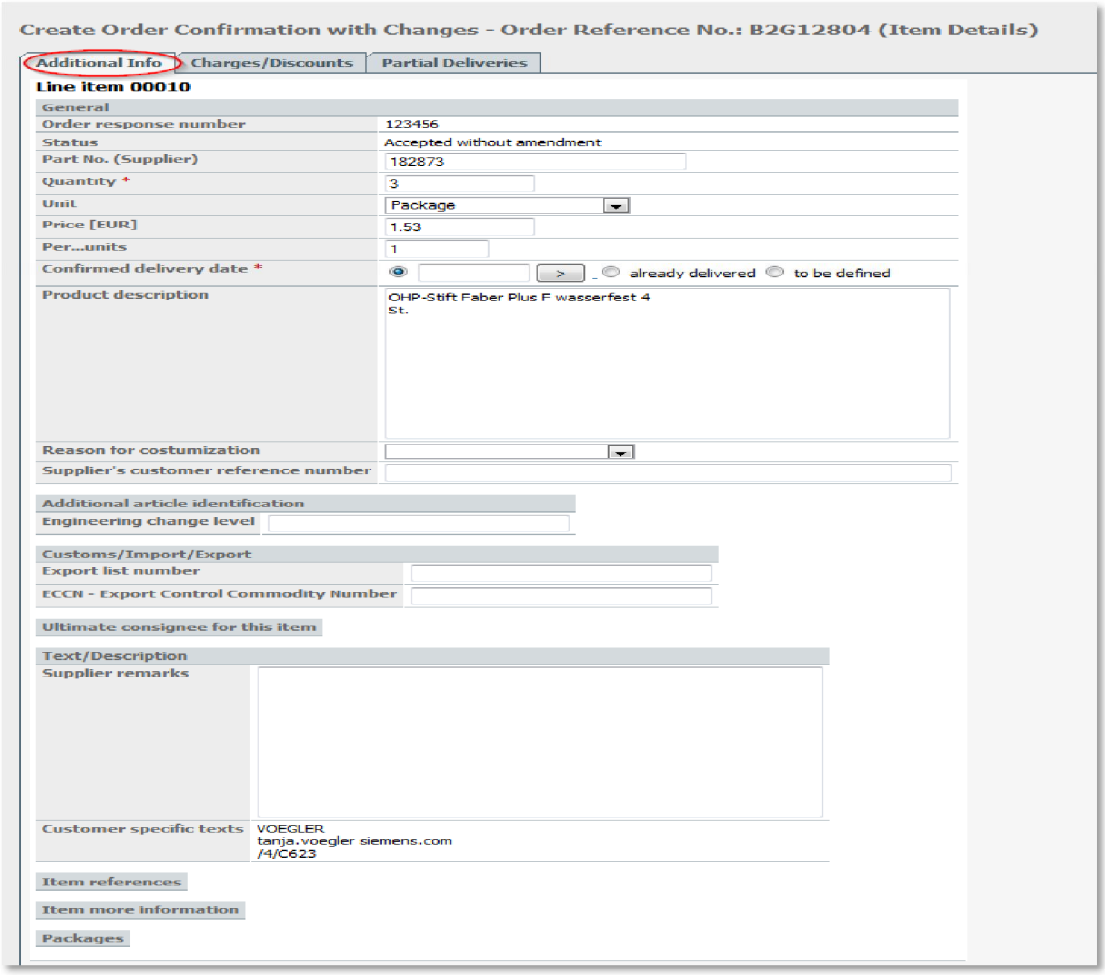
Here you can edit the order at item level.

In the “Additional Information“ you can change the item’s general properties, including:

- General (among others quantity, prices, delivery date)
- Additional article identification
- Customs/import/export
- Item texts/descriptions




| | |
|---|---|
| | Caution:<br>Any changes you make are restricted to this one item you are currently editing and not to any other items. The changes do thus not apply to the complete order. |

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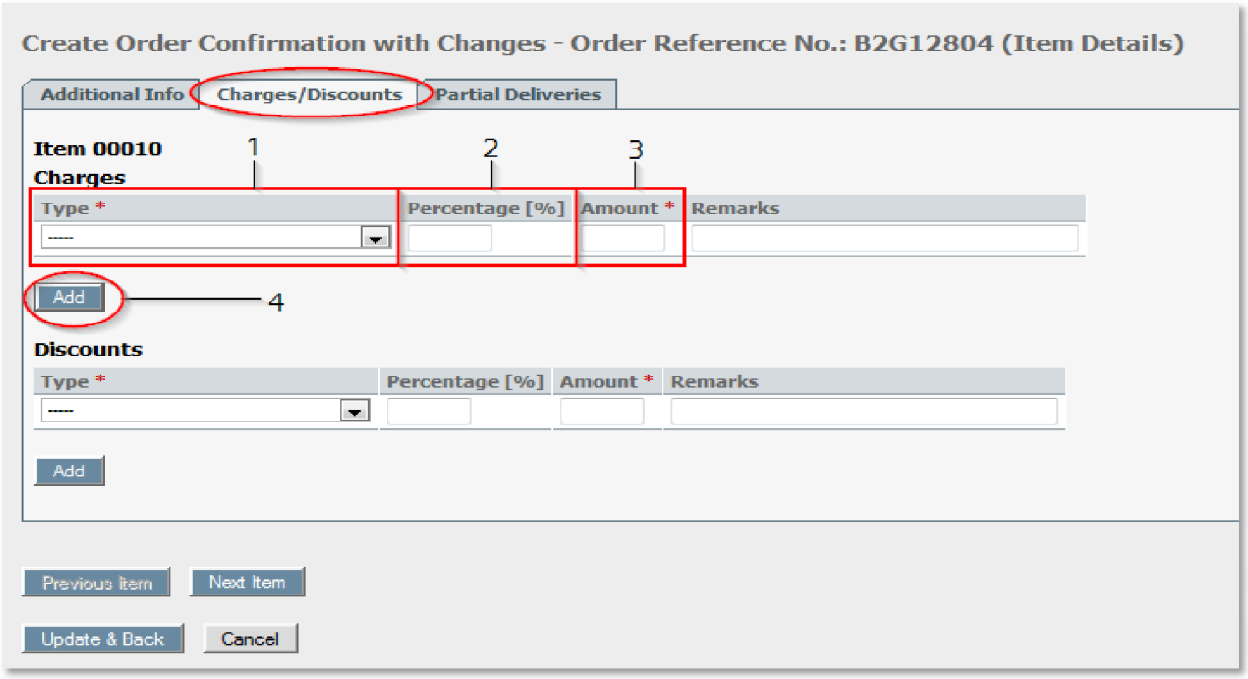
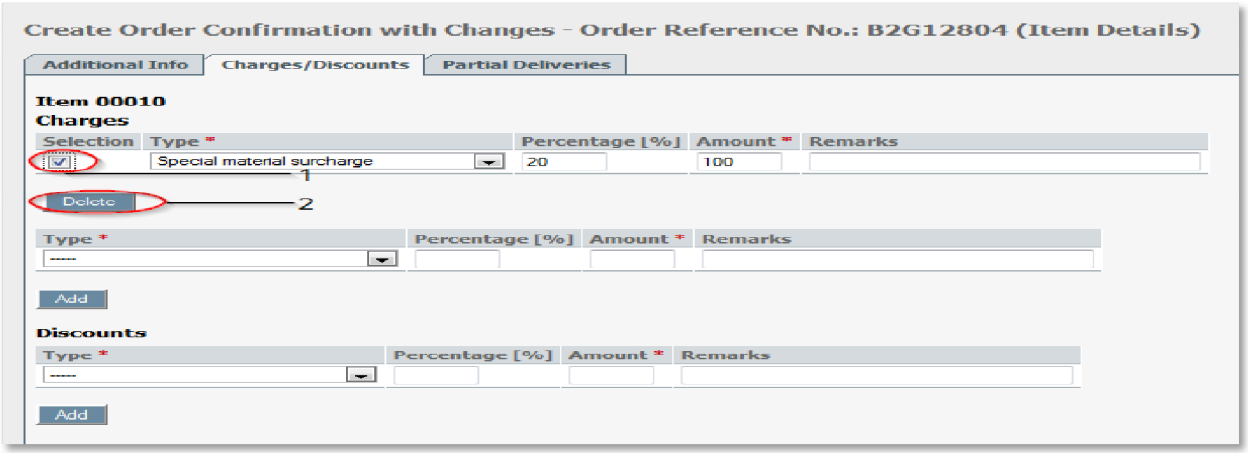
In the “Charges/Discounts“ tab you can define item-specific discounts or surcharges. These fields do not need to be filled in, they can be if necessary.




1. Use the button to select a charge/discount type.
2. Click “Percentage [%]“ and enter a percentage.
3. Click “Amount“ and enter an amount.
4. Click “Add“ to take over the charge/discount for the item.

✓ The charge/discount has been assigned to the item.

To delete the charge/discount you proceed as follows:




1. Select Charge/Discount by ticking the “check box” on the left side.
2. Click “delete“ to delete it.

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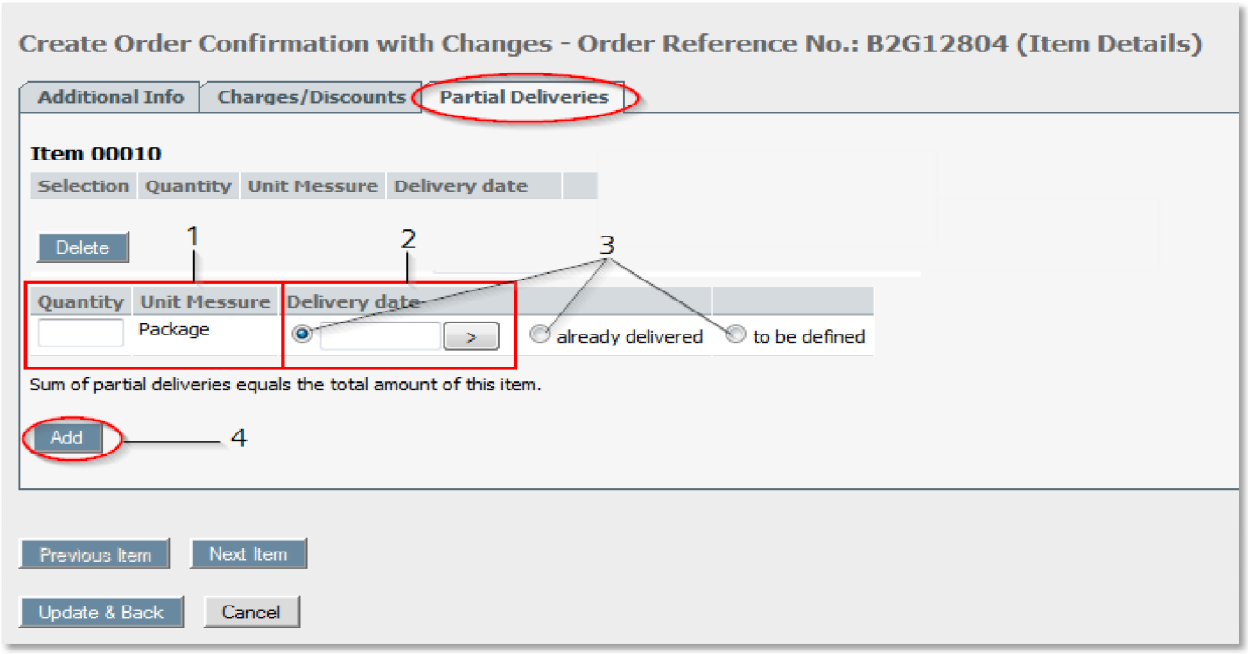
In the “Partial Deliveries“ tab you can split up the delivery into partial deliveries. Here you can define the quantities for the individual deliveries and the date.




1. Click “Quantity“ and enter the desired quantity.
2. Click “Delivery date“ and enter a date.
3. Select one of the options (“delivery date“; “already delivered“; “to be defined“).
4. Click “Add“ to create the partial delivery.

| | |
|---|---|
| | Caution:<br>When working with partial deliveries you need to make sure that the total quantity of the partial deliveries matches the total item quantity. |
| | Tip:<br>Click to open the calendar and select a date. |

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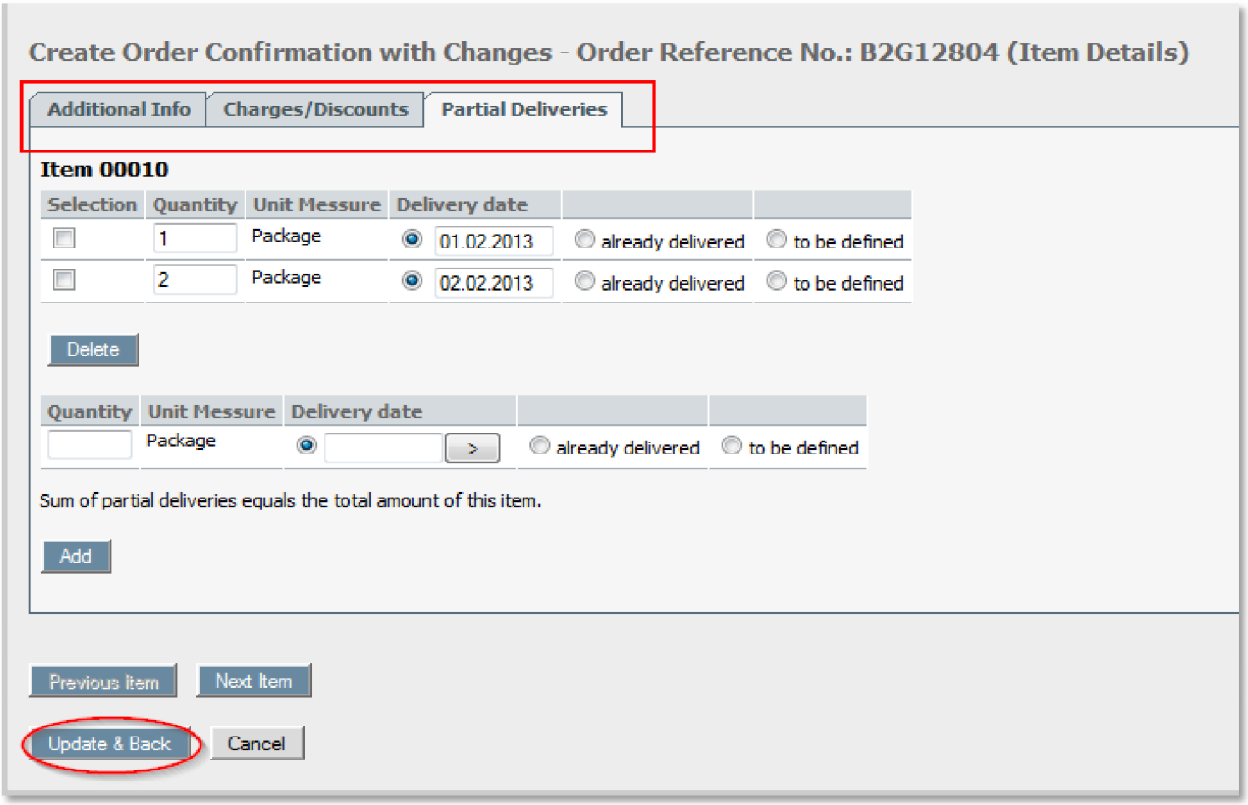
After you have edited all the item data you just need to save your changes, or you can cancel the transaction.




- Click “Update & Back“ to save the changes.
  The button can be found at the bottom of every tab.
- Click “Cancel“ to undo the changes.

✓ In both cases you return to the Item Data“ tab.

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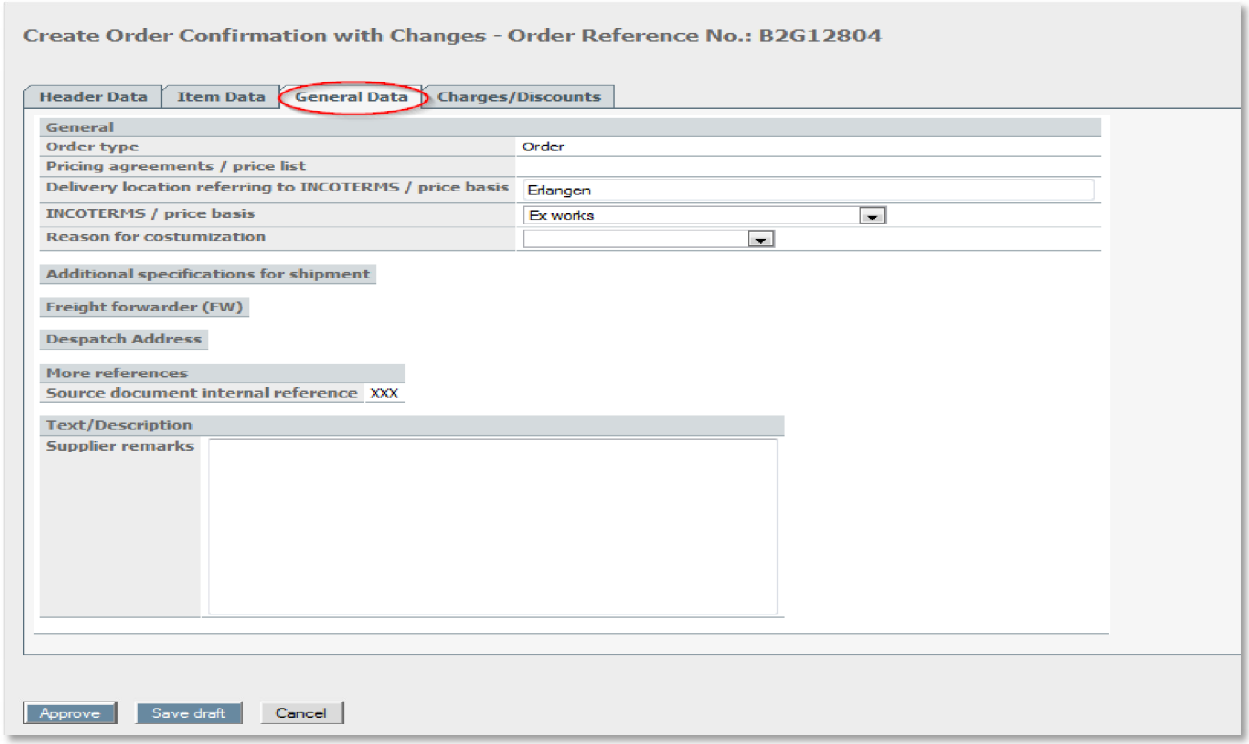
## 2) General data

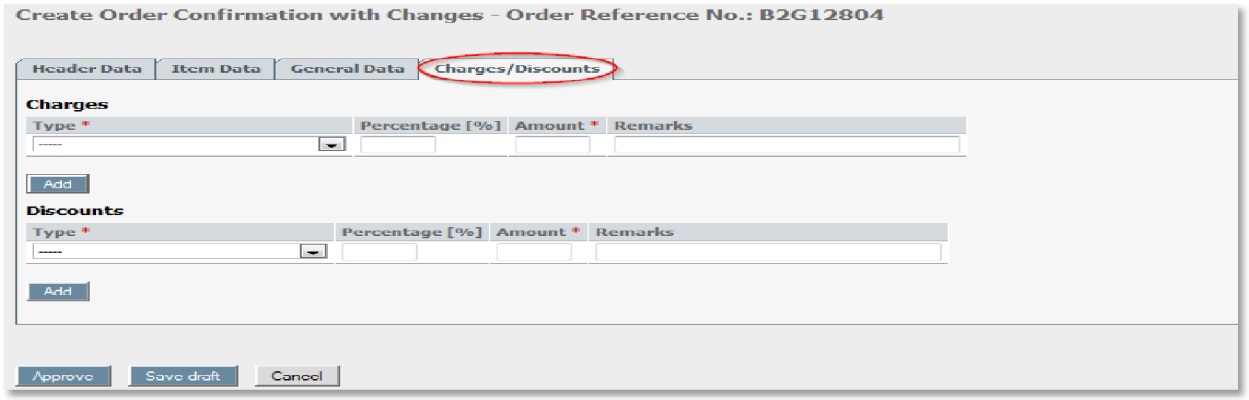
In “General data“ you can add general information to the order response. You can also add individual remarks. The general information includes:

- Price basis
- Delivery location referring to price basis
- Reason for customization




## 3) Charges/discounts

In the “Charges/discounts“ tab you can enter charges or discounts for an order at header level in the order response. The principle is the same as when defining them at item level (see 5.2.1 Tabs of order response with change 1)Item data Charge/discount page 39).

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### 5.2.2 Save order response with changes

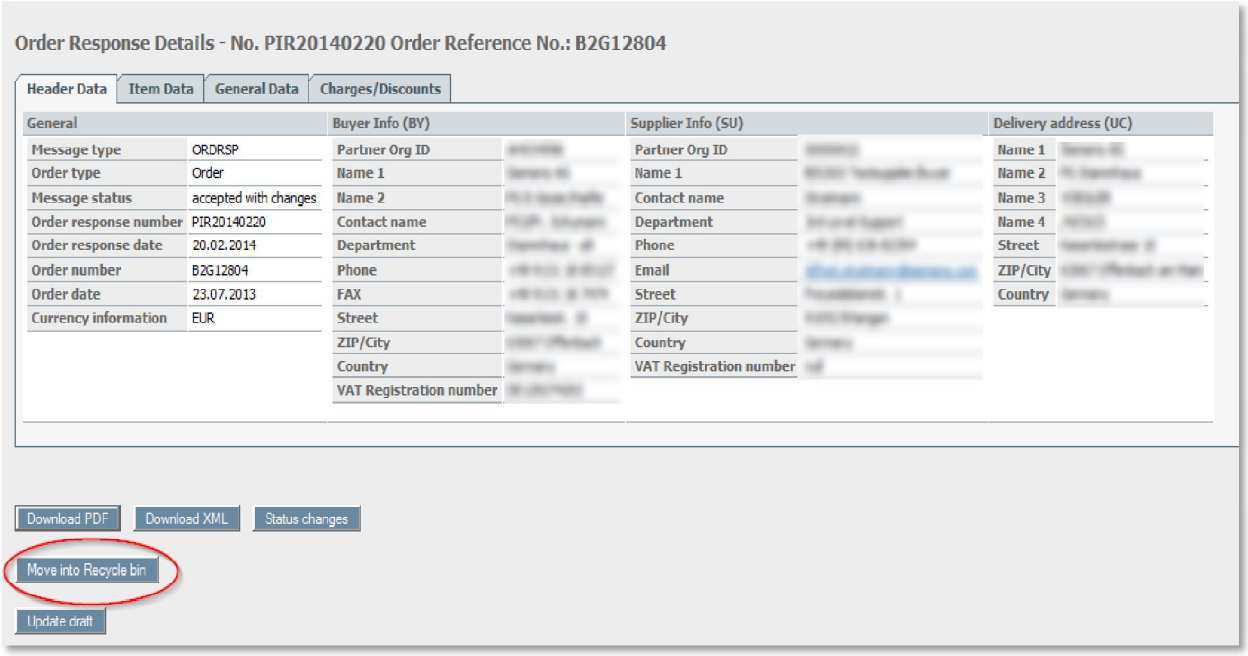
When you have finished editing the order and made all changes, you can confirm the transaction or cancel it completely. After you have confirmed the transaction you have several options:

- ➢ Click “Save draft“ to save the order response in the drafts.
- ✓ The order response is moved into the “Drafts“ folder and can then be edited further or sent later on (see 7 Drafts S.60)
- ➢ Click “Send message“ to send the order response immediately.

## 5.3 Delete order response

If the order response transaction is finished you can move the order response into the recycle bin and thus release it for deletion.

Prerequisite: You must be in an “Order response’s” message action “Details“.




- ➢ Click “Move into recycle bin“.
- ✓ The message status is set to “completed“.

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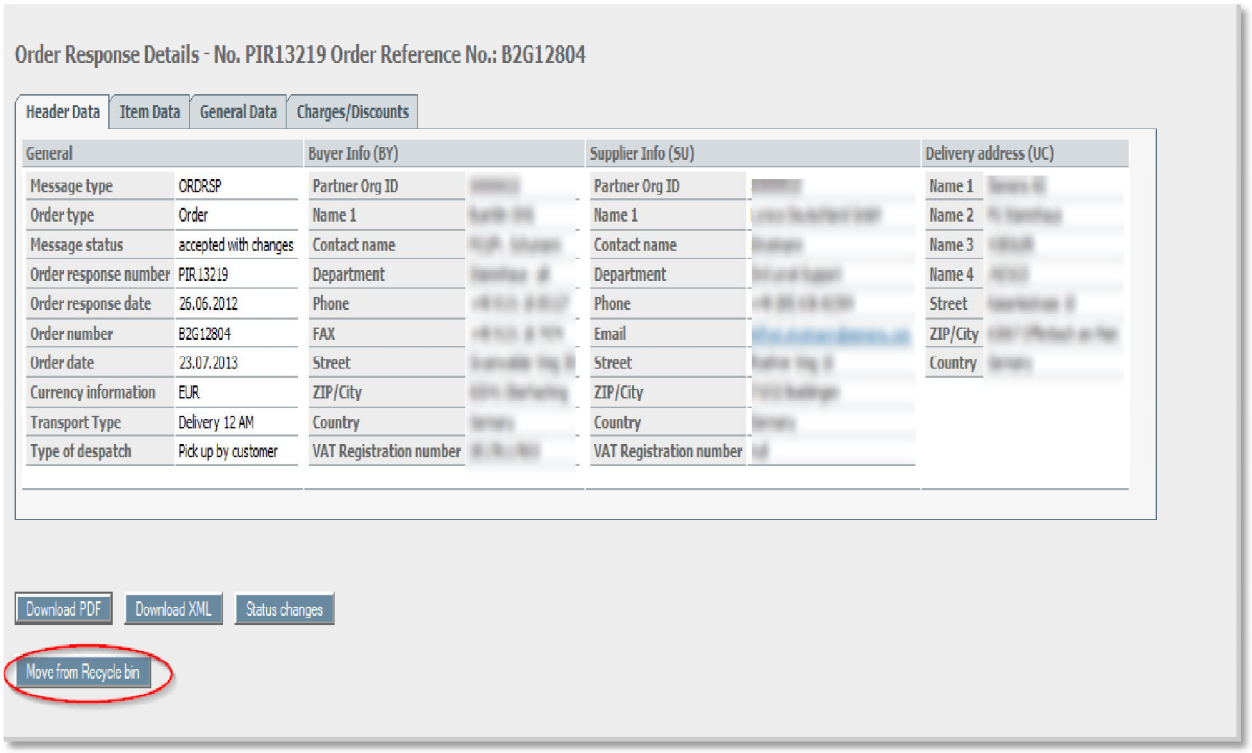
# 5.4 Restore order response

To restore an order response and thus retrieve it from the recycle bin you proceed as follows:

Prerequisite: You must be in a message's message action "Details" in the "Recycle bin".




- ➢ Click "Move from recycle bin".
- ✓ The message is moved back into the "Order response" folder.

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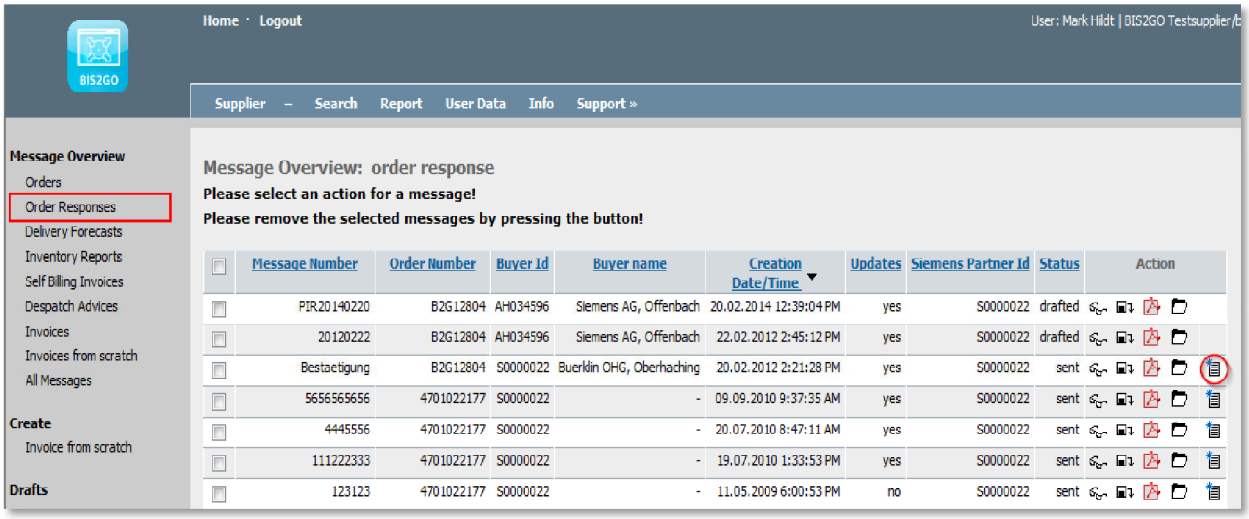
# 6 Generate invoices

If you are authorized to generate invoices, you as internal supplier have two possibilities to generate an invoice:

- Generate invoice on the basis of an order response
- Create invoice from scratch without order reference

## 6.1 Generate invoices from an order response

Prerequisite: To generate an invoice on the basis of an order response you must be in the “Message overview“ of the “order responses“.


Home · Logout
User: Mark Hildt | BIS2GO Testsupplier/b
BIS2GO
Supplier – Search Report User Data Info Support »
Message Overview
Orders
Order Responses
Delivery Forecasts
Inventory Reports
Self Billing Invoices
Despatch Advices
Invoices
Invoices from scratch
All Messages
Create
Invoice from scratch
Drafts
Message Overview: order response
Please select an action for a message!
Please remove the selected messages by pressing the button!
Message Number | Order Number | Buyer Id | Buyer name | Creation Date/Time | Updates | Siemens Partner Id | Status | Action
PIR20140220 B2G12804 AH034596 Siemens AG, Offenbach 20.02.2014 12:39:04 PM yes S0000022 drafted
20120222 B2G12804 AH034596 Siemens AG, Offenbach 22.02.2012 2:45:12 PM yes S0000022 drafted
Bestaetigung B2G12804 S0000022 Buerklin OHG, Oberhaching 20.02.2012 2:21:28 PM yes S0000022 sent
5656565656 4701022177 S0000022 - 09.09.2010 9:37:35 AM yes S0000022 sent
4445556 4701022177 S0000022 - 20.07.2010 8:47:11 AM yes S0000022 sent
111222333 4701022177 S0000022 - 19.07.2010 1:33:53 PM yes S0000022 sent
123123 4701022177 S0000022 - 11.05.2009 6:00:53 PM no S0000022 sent

1. Click “Order Responses” in the message overview.
2. Click the button in the actions to generate an invoice from an order response.

✓ The invoice automatically takes the values from the order response. Nevertheless, some fields must be additionally filled in.

| | |
|---|---|
| | Caution:<br>Only order responses with status “sent“ can be used for the invoice generation. |
| | Tip:<br>If you are in an order response’s “Details“ you can click the “Generate Invoice“ button. |

### 6.1.1 Invoice tabs from an order response

The following sections describe the tabs of the invoice on the basis of an order response.

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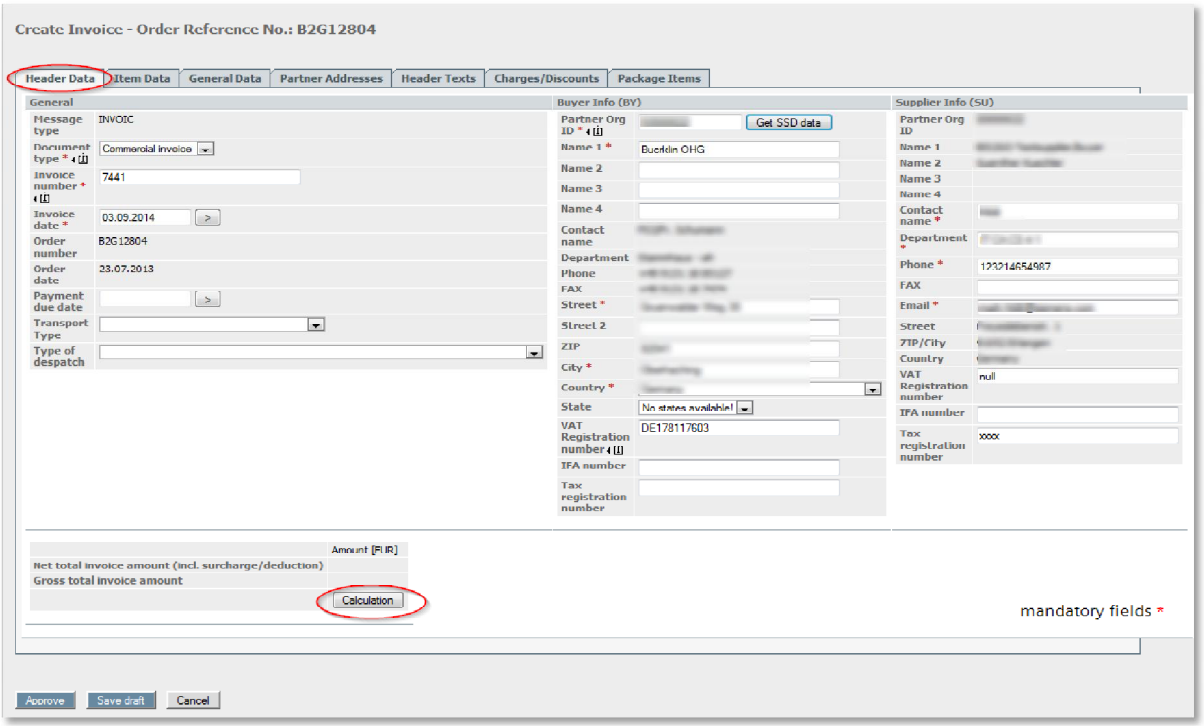
## 1) Header data

The “Header Data“ tab contains the basic invoice data.

You can either amend the buyer information with SSD or define the invoice type.




- Click one of the “white fields“ to edit the field.
- Click “Calculation“ to calculate the current invoice value.

| | |
|---|---|
| | Caution:<br>The invoice value must be recalculated internally before sending the message. |
| | Note:<br>Calculate the current invoice value when you have changed items or discounts. |
| | Note:<br>The invoice number can be freely selected. An invoice number may only be used once in the calendar, otherwise it will be rejected by the system. |
| | Note:<br>Fields marked with * are mandatory fields. |
| | Tip:<br>Click to display explanations for the entry field. |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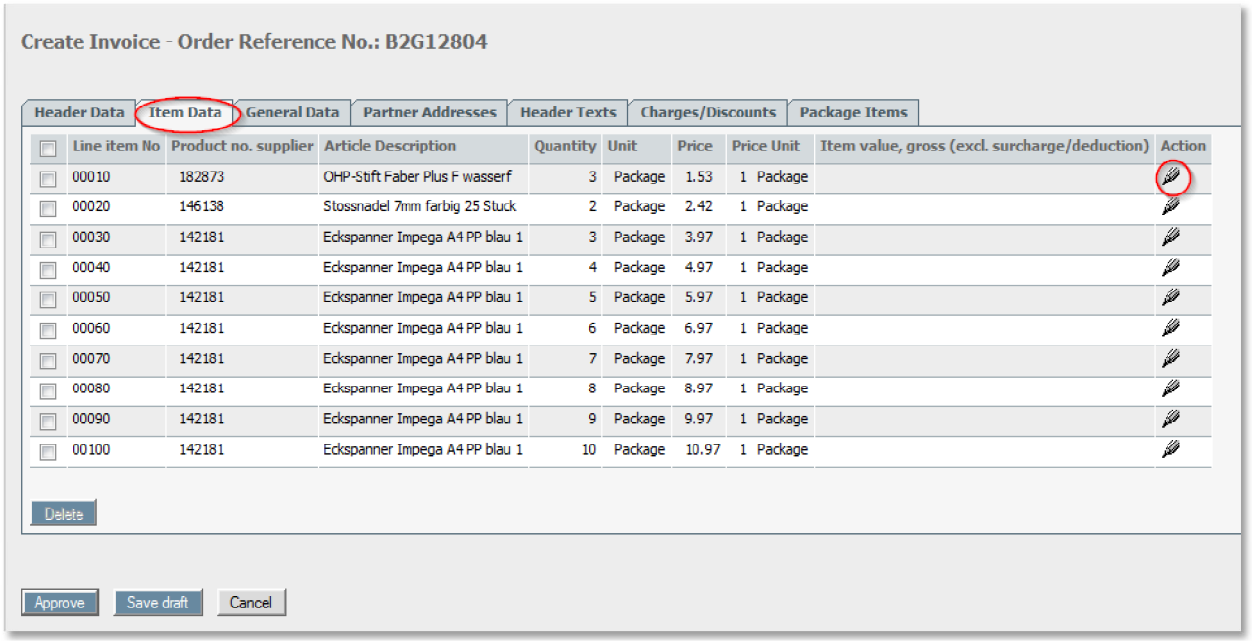
2) Item data

In the “Item Data“ you can find information about the individual invoice items.

Here you can delete, edit or update individual invoice items.


Create Invoice - Order Reference No.: B2G12804
Header Data
Item Data
General Data
Partner Addresses
Header Texts
Charges/Discounts
Package Items
Line item No
Product no. supplier
Article Description
Quantity
Unit
Price
Price Unit
Item value, gross (excl. surcharge/deduction)
Action
00010 182873 OHP-Stift Faber Plus F wasserf 3 Package 1.53 1 Package
00020 146138 Stossnadel 7mm farbig 25 Stuck 2 Package 2.42 1 Package
00030 142181 Eckspanner Impega A4 PP blau 1 3 Package 3.97 1 Package
00040 142181 Eckspanner Impega A4 PP blau 1 4 Package 4.97 1 Package
00050 142181 Eckspanner Impega A4 PP blau 1 5 Package 5.97 1 Package
00060 142181 Eckspanner Impega A4 PP blau 1 6 Package 6.97 1 Package
00070 142181 Eckspanner Impega A4 PP blau 1 7 Package 7.97 1 Package
00080 142181 Eckspanner Impega A4 PP blau 1 8 Package 8.97 1 Package
00090 142181 Eckspanner Impega A4 PP blau 1 9 Package 9.97 1 Package
00100 142181 Eckspanner Impega A4 PP blau 1 10 Package 10.97 1 Package
Delete
Approve
Save draft
Cancel

➢ Click to edit the item data.

✓ Now you are at item level.

Here you can edit the following information at item level:

- Additional information
- Preferences
- Charges/discounts

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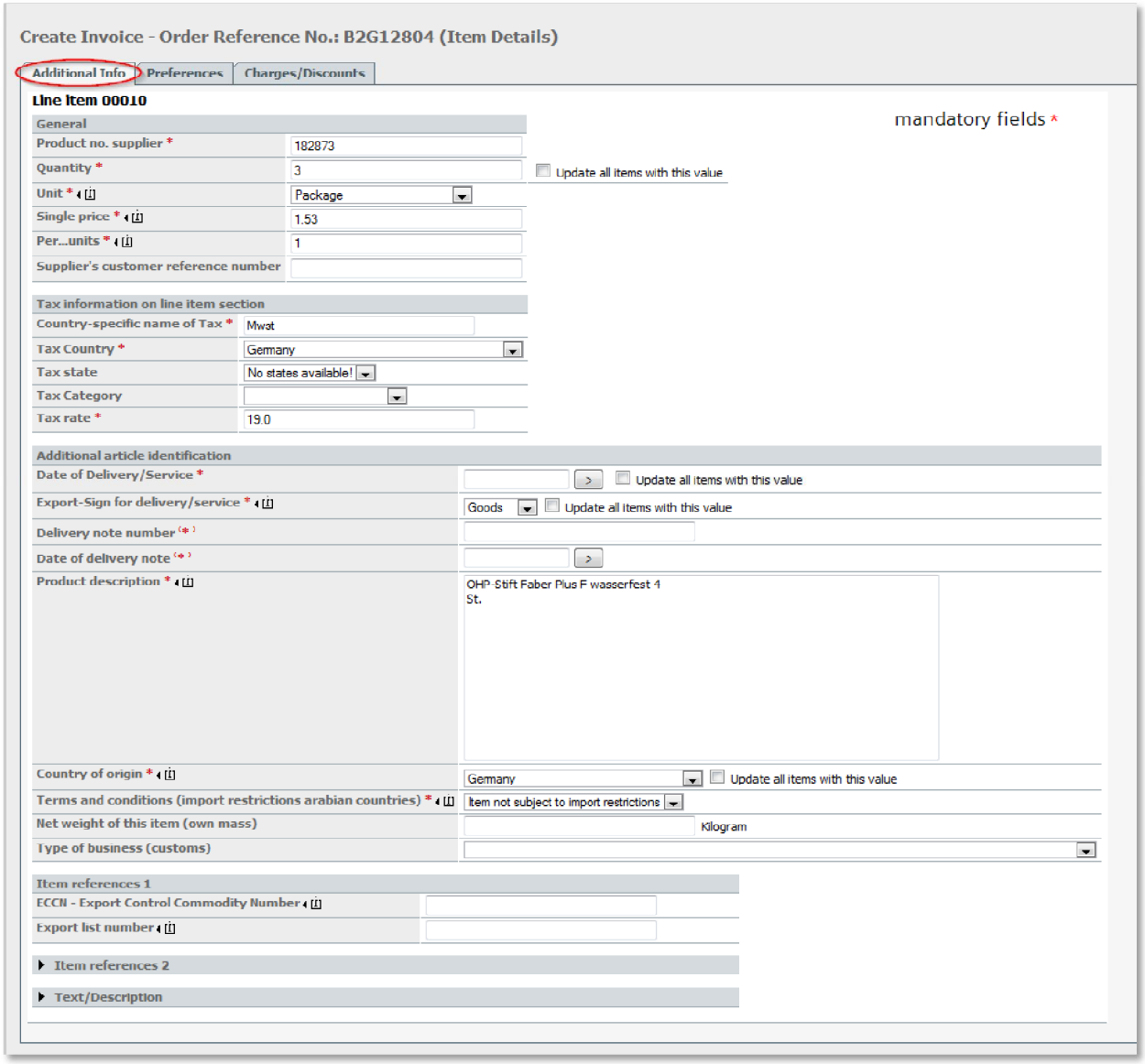
In the “Additional information“ you can change general item data.




- Click ▶ to display further entry fields in “Item references 2“.
- Click ▶ to display further entry fields in “Text/Description“.

| | |
|---|---|
| | Note:<br>Fields marked with * are mandatory fields. |
| | Tip:<br>Click to display explanations for the entry field. |

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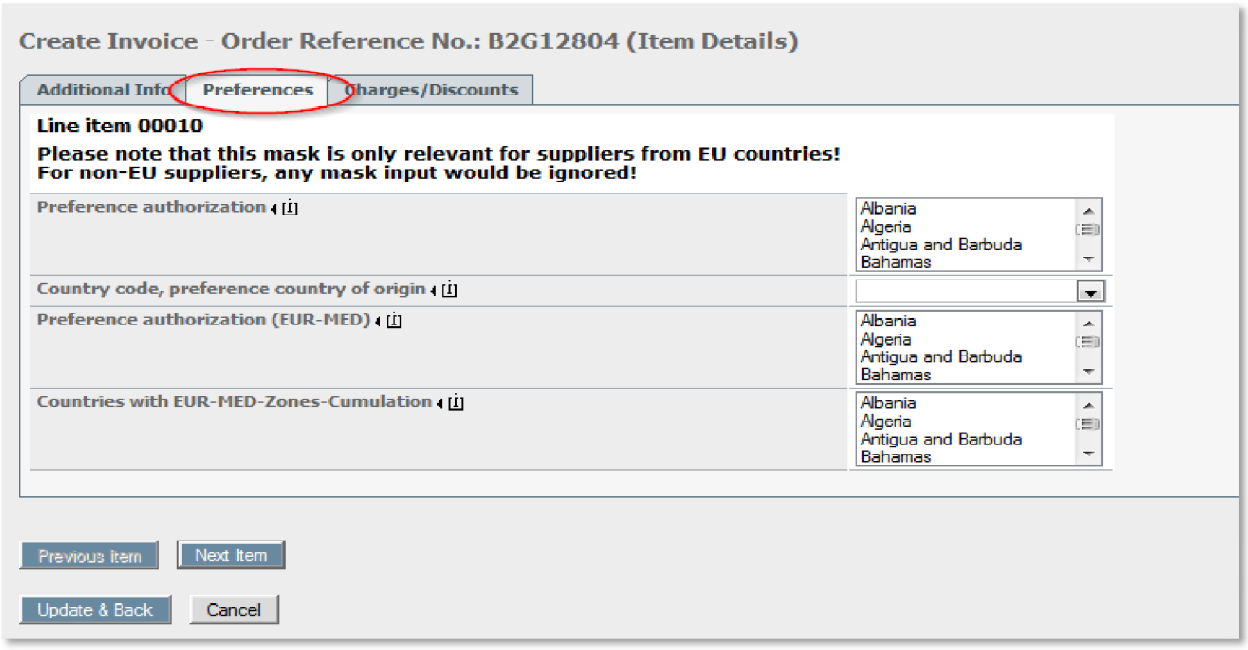
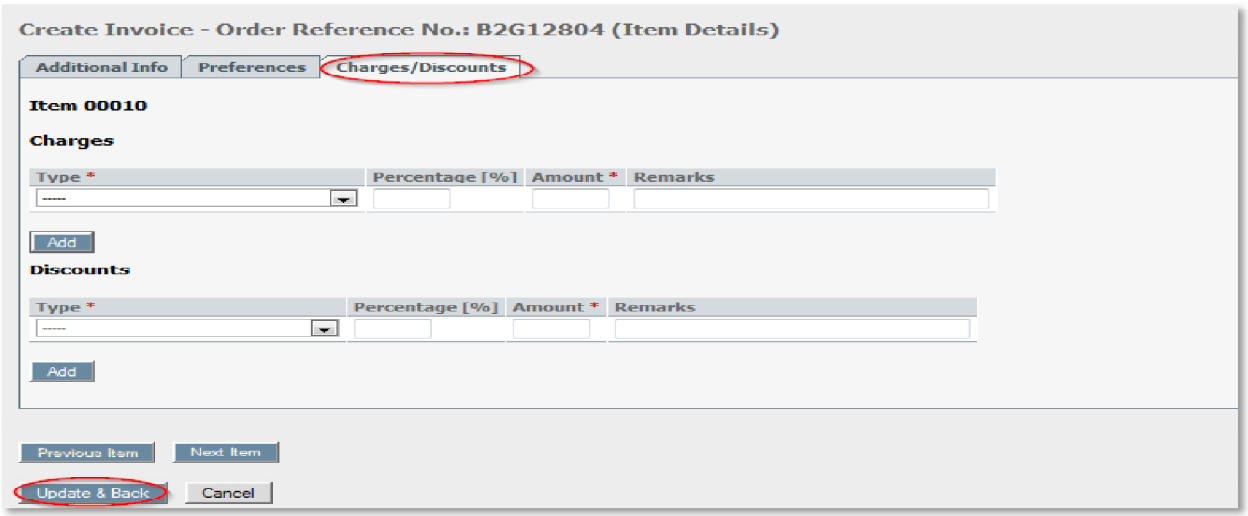
In “Preferences“ you can enter preference authorizations.




| | |
|---|---|
| | Tipp:<br>Click [i] to display explanations for the entry field. |
| | Tip:<br>Keep the [CTRL] key pressed to mark more than one country. |

In “Charges/Discounts” you can delete defined conditions or enter new ones.




➢ Click “Update & Back“ to confirm the changes.

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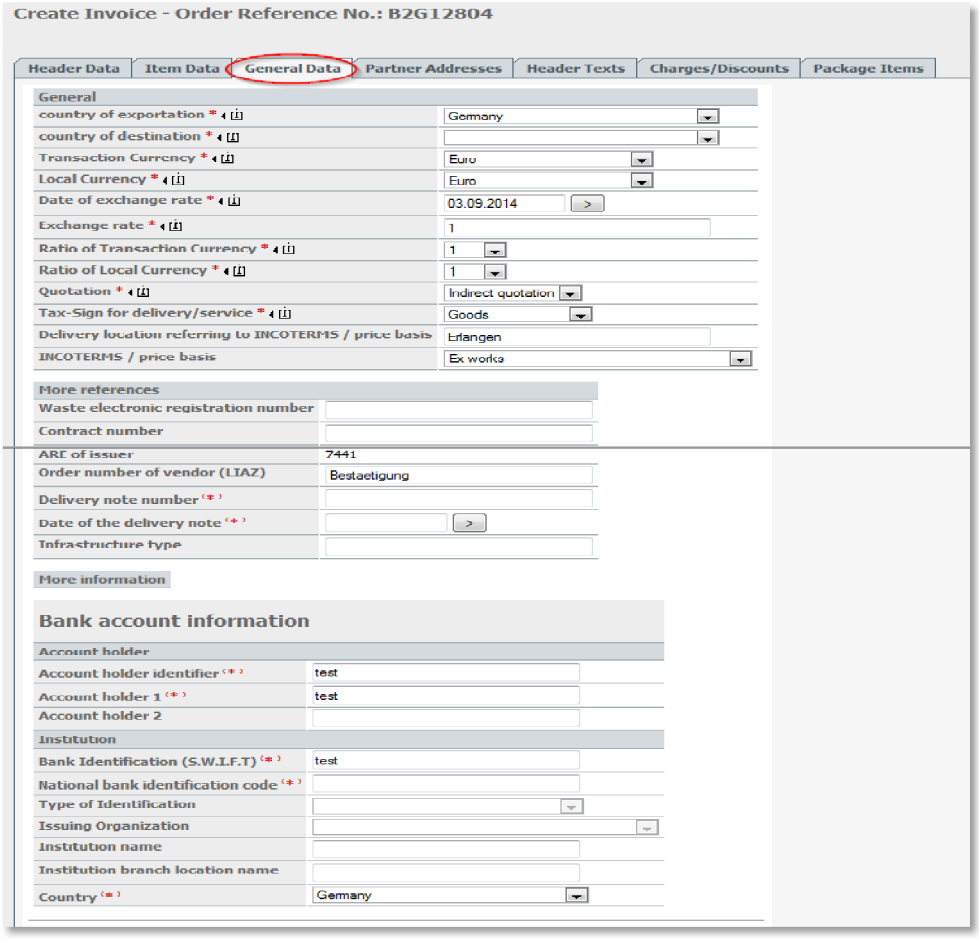
✓ You will return to the invoice generation level.

3) General data

In the “General Data“ tab you can edit the following information categories:

- General
- Header references
- Bank account information




| | |
|---|---|
| | Note:<br>Fields marked with * are mandatory fields. |
| | Tip:<br>Click to display explanations for the entry field. |
| | Tip:<br>Click to open the calendar and select a date. |

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4) Partner addresses

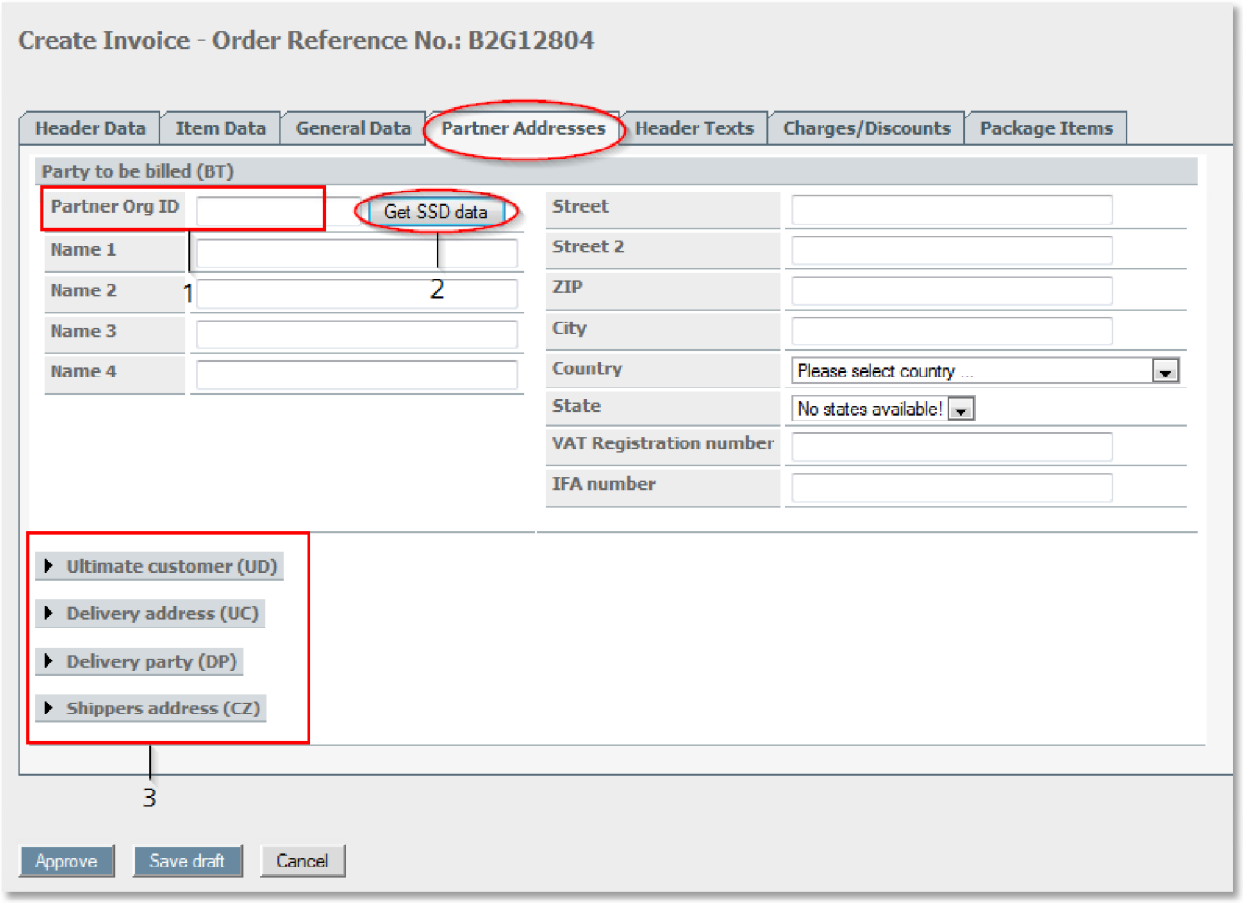
In the “Partner Addresses“ tab you can find a list of possible partners and their addresses.

Here you can add information to the following topics:

- Party to be billed (BT)
- Ultimate customer (UD)
- Delivery address (UC)
- Delivery party (DP)
- Shippers address (CZ)

The “Party to be billed“ can be automatically filled in by the SSD.

Prerequisite: The partner ID must be known.




1. Click the “Partner-ID“ and enter the ORG-ID of the corresponding partner.
2. Click “Get SSD data“ to confirm the ORG-ID.
3. Click ▸ to open one of the other topics and edit the information.

| | |
|---|---|
| | Tip:<br>The delivery address is taken from the order response. |

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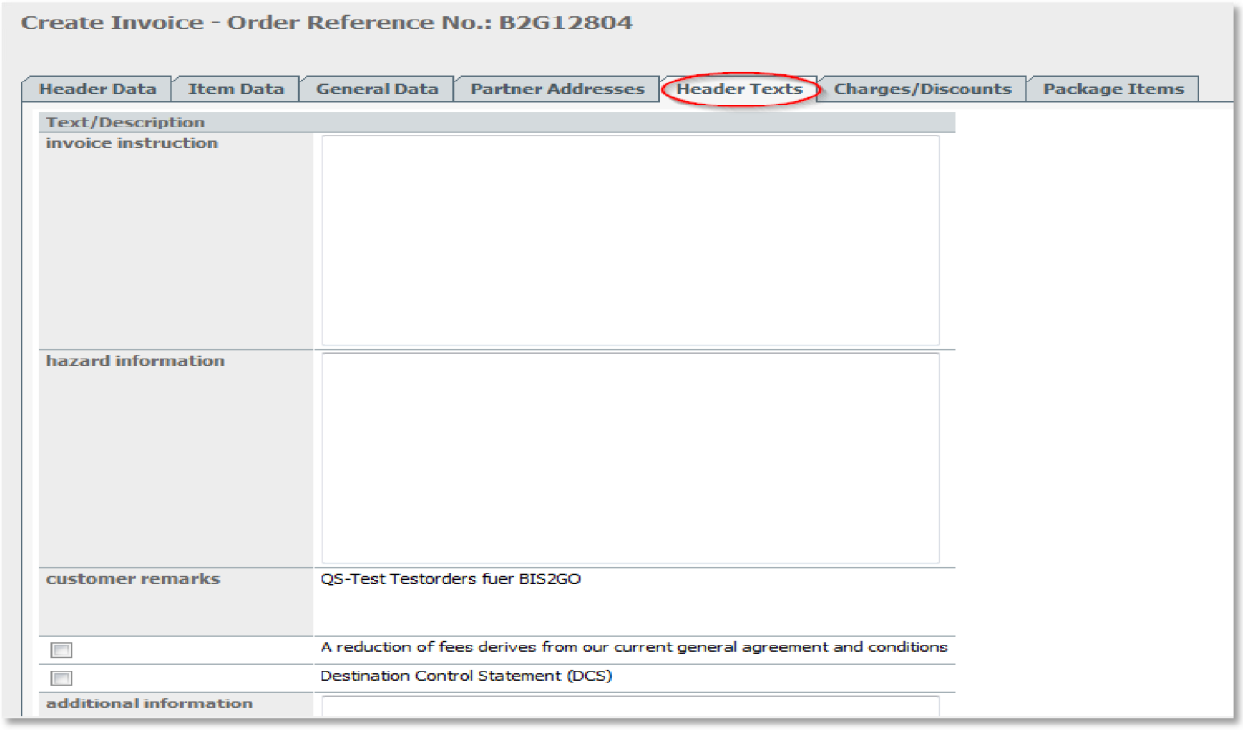
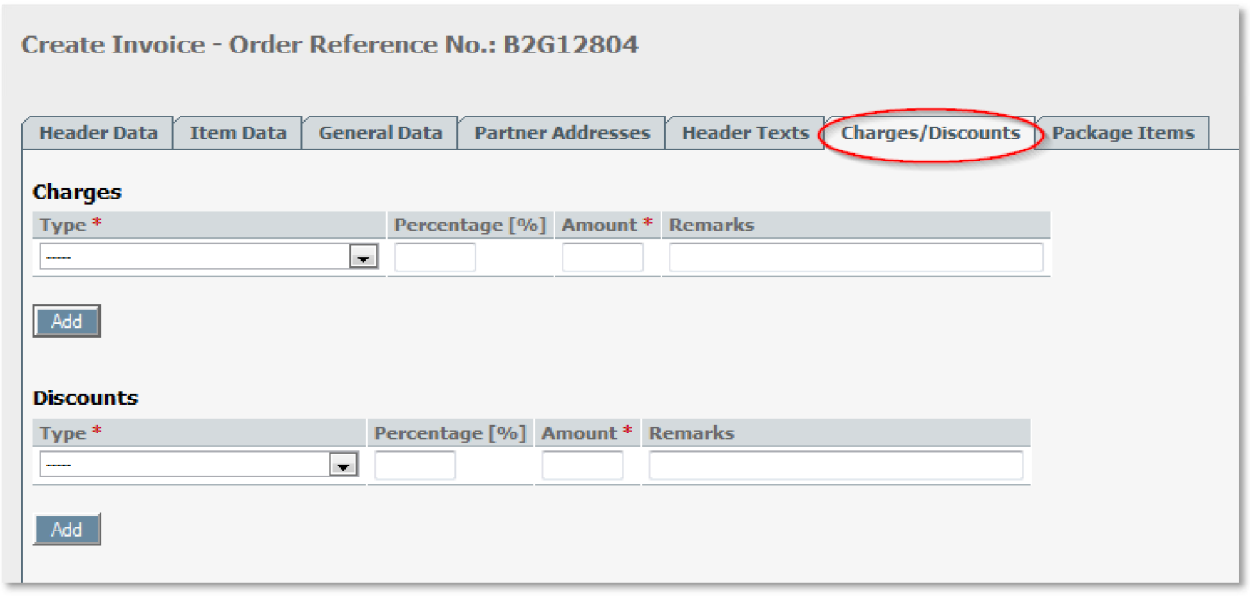
5) Header texts

In the “Header Texts” tab you can enter your own header texts or additional information.




6) Charges/discounts

In the “Charges/Discounts“ tab you can specify charges/discounts at invoice level, similar to the proceeding at item level (see 5.2.Order response tabs with change 1)Item data Charges/discounts page39).

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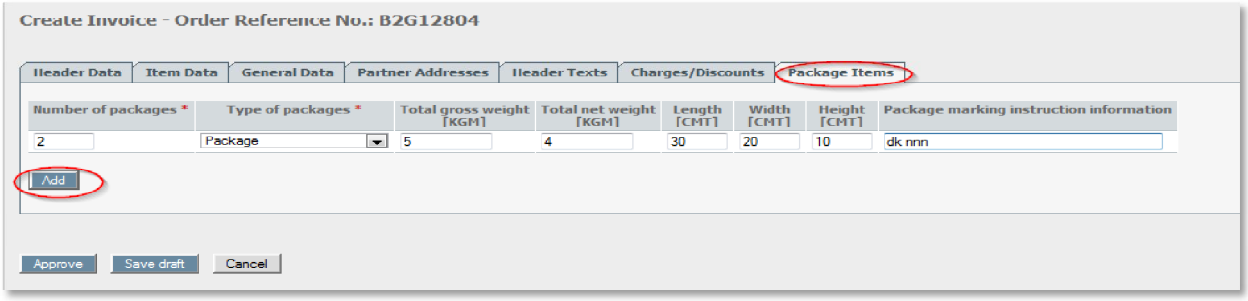
7) Package items

In the “Package Items” tab you can specify the packaging type and characteristics.



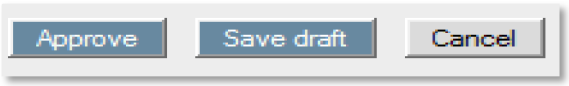

- Click the desired field and enter the contents.
- Click “Add“ to add a package.

✓ The package has been added to your invoice. Now you can also select it and delete it with the “Delete“ button.

| | |
|---|---|
| | Note:<br>Fields marked with * are mandatory fields. |

## 6.1.2 Save invoice from an order response

When you are finished with the invoice generation and have made all changes, you can take the changes over with the “Approve“ button.




- With “Save draft“ you can save the message as draft.
- With “Cancel“ you can cancel the generation at any time.

| | |
|---|---|
| | Note:<br>The buttons “Approve“, “Save draft“, “Cancel“ can be found at the bottom of every tab. |
| | Note:<br>When you click the “Approve“ button the system performs numerous changes to make sure that the invoice complies with the mandatory Siemens guidelines. |
| | Tip:<br>You can also save incomplete invoices and edit them later (see 7 Drafts page60). |

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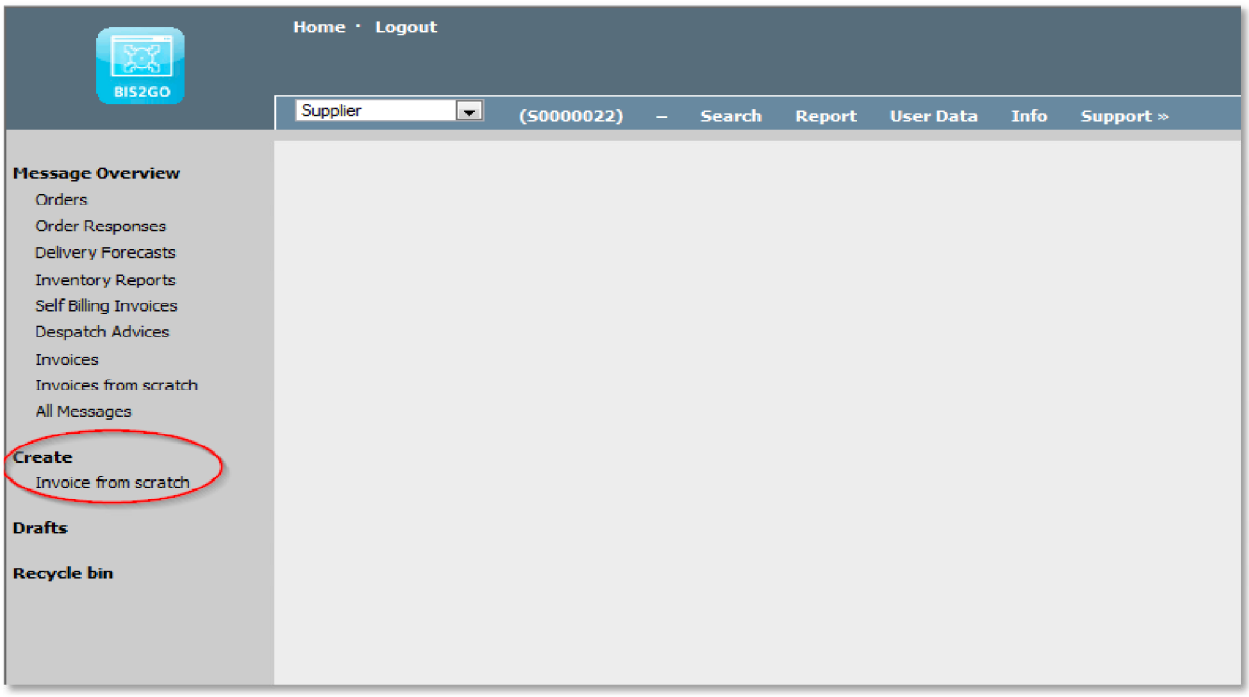
# 6.2 Create invoices from scratch

If you want to generate an invoice without order reference you use the function on the left side of the “message overview“. There you can find the category “invoice from scratch” in menu item “Create“.




➢ Click the item “Invoice from scratch” in the “Create“ menu.

✓ Now only the data from your user administration is preset.

| | |
|---|---|
| | Note:<br>The next steps are identical for the invoice generation from an order response and invoices from scratch and are thus explained at the end of the chapter. |

## 6.2.1 Tabs in the invoice from scratch

The tabs in the invoice from scratch are described in the following.

1) Header data

The “header data“ section offers the possibility to load data automatically from the SSD to reduce the work effort for the data entry.

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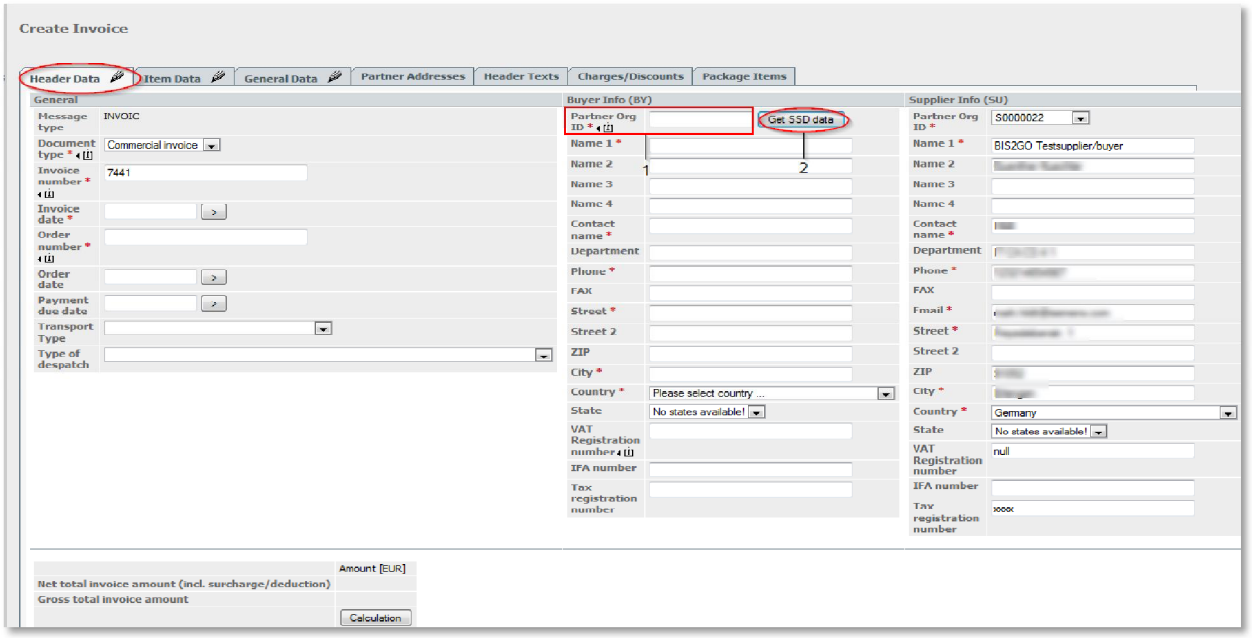
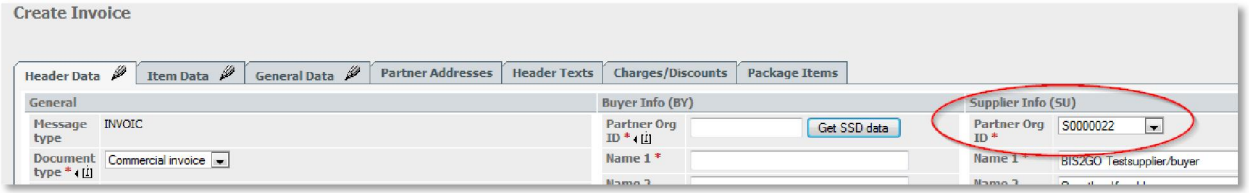



1. Click the “Partner-ID“ field and enter the ORG-ID of the respective partner.
2. Click “Get SSD data“ to confirm the ORG-ID.

If you have been assigned an authorization for several ORG-IDs you need to select the supplier’s ORG-ID. The supplier data can be updated from the SSD.




| | |
|---|---|
| | Note:<br>To retrieve the data from the SSD you need your partner’s ORG-ID. |
| | Notes:<br>Fields marked with * are mandatory fields. |
| | Tip:<br>Click [i] to display explanations for the entry field. |

## 2) Item data

The “Item Data“ requires more work effort for the data entry as the items need to be entered manually. In contrast to the external customers the item data offers more possibilities to enter information.

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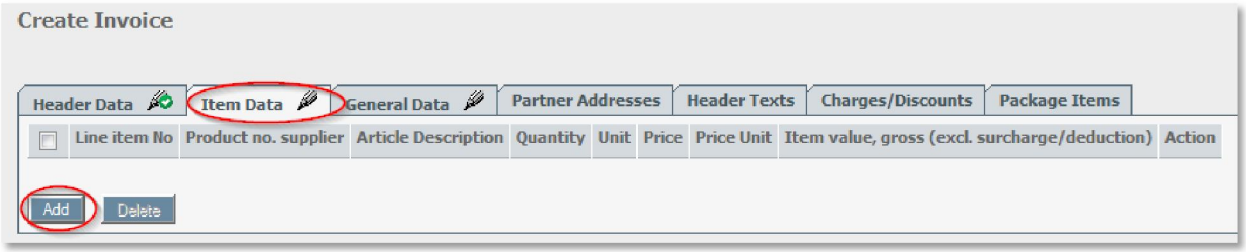
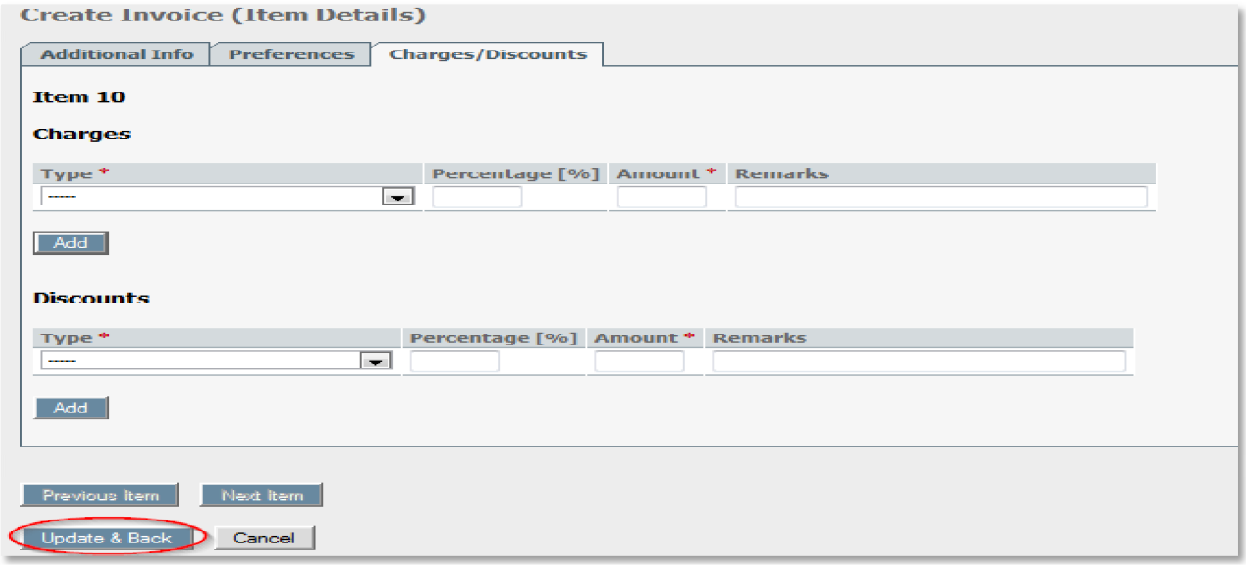



➢ Click “Add“ to edit the item data.

In the item data the “Additional information“, “Preferences“ and “Charges/discounts“ are entered similar to the invoice generation on the basis of an order response (see 6.1.1 Invoice on the basis of an order response Fehler! Verweisquelle konnte nicht gefunden werden.Fehler! Verweisquelle konnte nicht gefunden werden. pageFehler! Textmarke nicht definiert.).

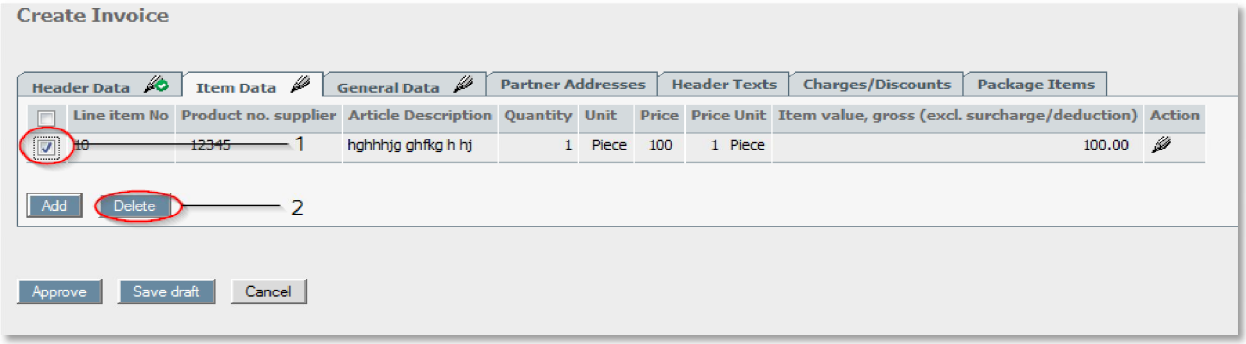



➢ Click “Update & Back“ to confirm the changes.

✓ You will return to the invoice generation level.

After confirming with “Update & Back“ the item view will be updated.

If you want to delete an item you proceed as follows:




1. Select the item by ticking the “check box“ on the left side.

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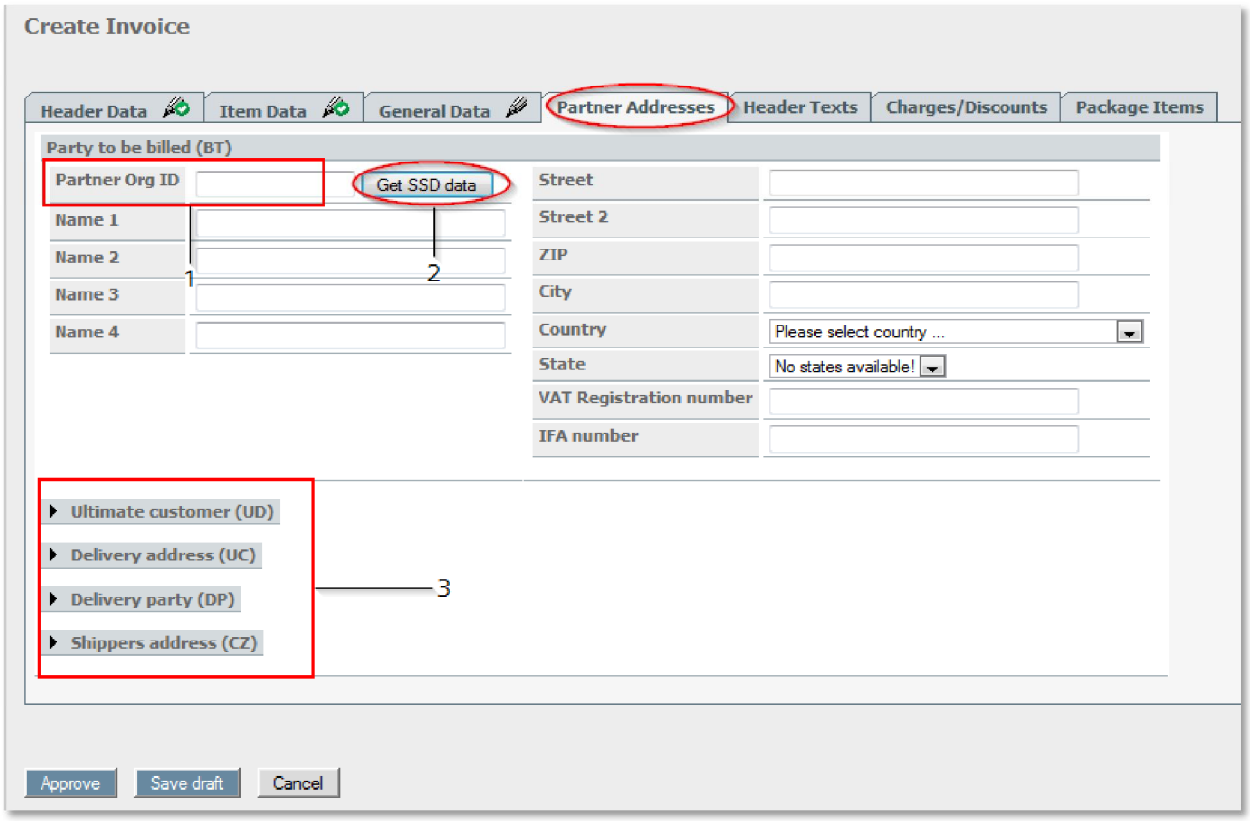
2. Click “Delete“ to delete the item.

| | |
|---|---|
| | Caution:<br>The tabs “General data“, “Charges/discounts“ and “Package items“ can be edited in the same way as in the invoice generation on the basis of an order response (See 6.1 Generate invoices from an order response page 45). |

3) Partner addresses

In the “Partner addresses“ tab, you can enter the following addresses:

- Party to be billed (BT)
- Ultimate customer (UD)
- Delivery address (UC)
- Delivery party (DP)
- Shippers address (CZ)




1. Click the “Partner-ID“ field and enter the ORG-ID of the respective partner.
2. Click “Get SSD data“ to obtain the ORG-ID details.
3. Click ▸ to open one of the other topics and edit the information.

| | |
|---|---|
| | Tip:<br>The party to be billed can be loaded from the SSD via the partner-ID. |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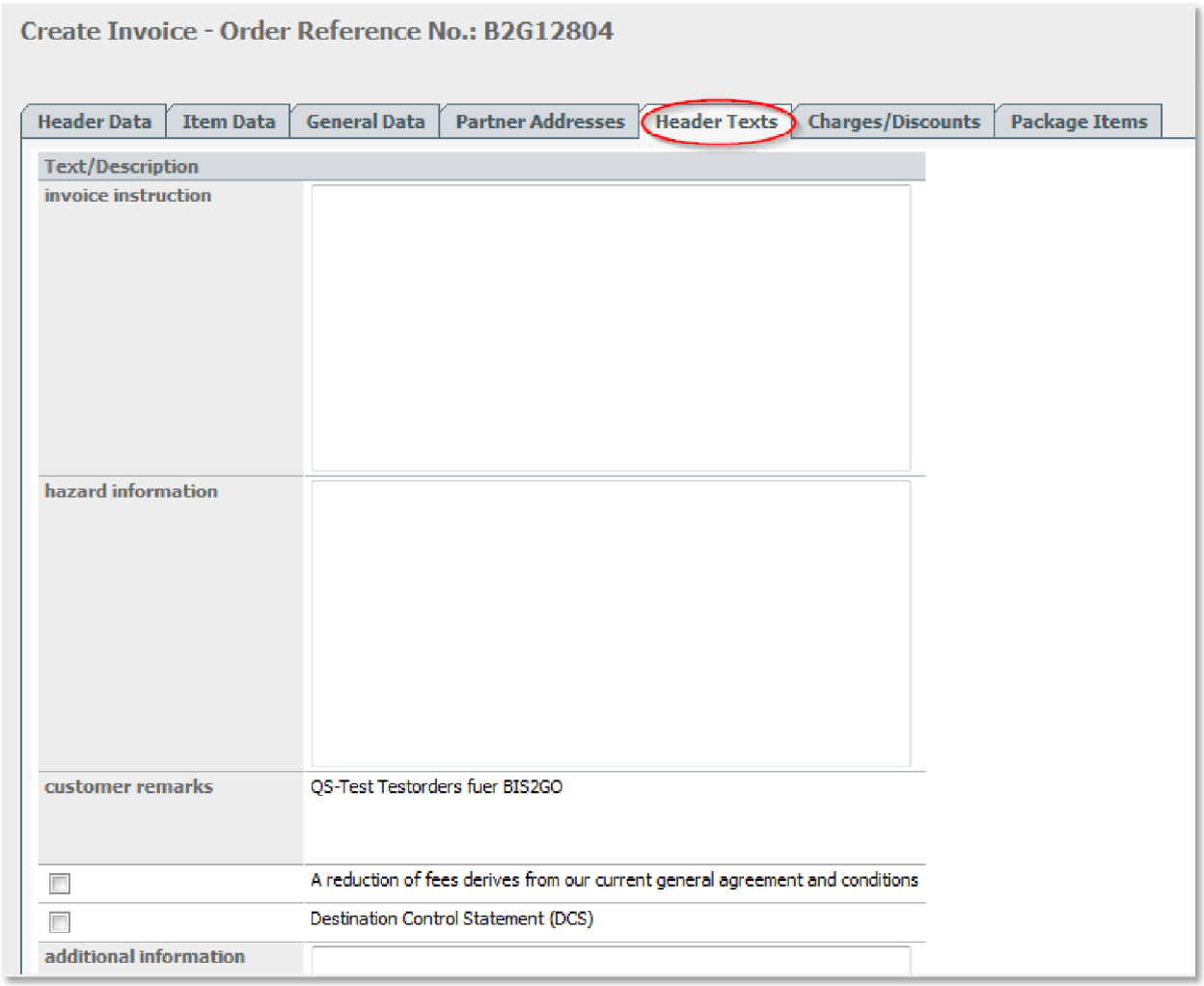
4) Header texts

In the “Header texts“ tab you can make manual entries regarding notes and remarks, and additional information.

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## 6.2.2 Save invoice from scratch

When you are finished with the invoice generation and have made all changes you can click “Approve“ to finalize.

After all invoice checks have been passed through successfully you have the following possibilities:

- Click “Save draft“ to save the invoice.
- Click “Send message“ to send the message immediately.

| | |
|---|---|
| | Note:<br>When you click the “Approve“ button the system performs numerous changes to make sure that the invoice complies with the mandatory Siemens guidelines. |
| | Tip:<br>You can also save incomplete invoices and edit them later (see 7 Drafts page 60). |

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# 7 Drafts

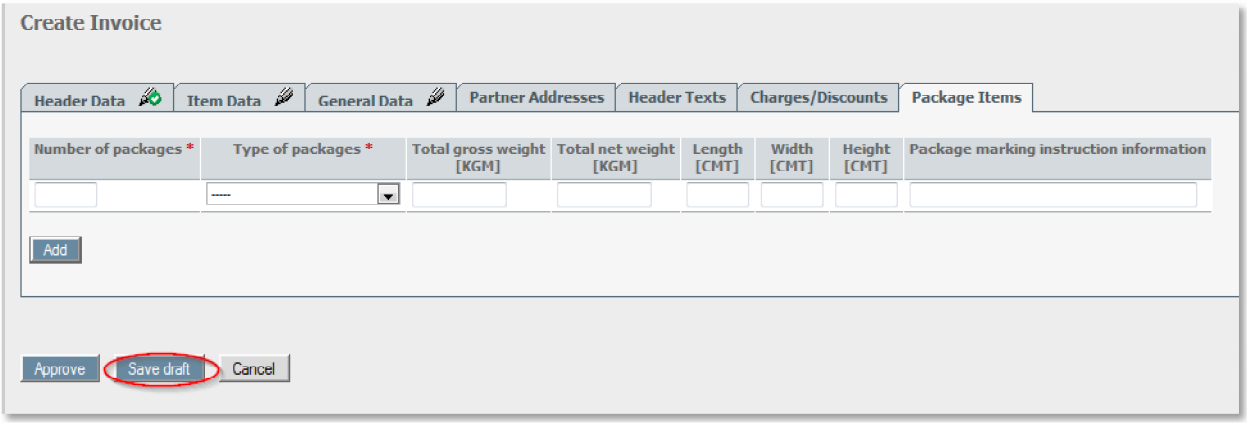
You can save the following message types as draft, and then edit or send them later:

- Order response with changes
- Invoice on the basis of an order response
- Invoice from scratch

## 7.1 Save drafts

If you want to interrupt the editing of a message type you can ”save a draft”. You can then continue editing it later on.

Prerequisite: You must be in a message’s “Details“.




➢ Click “Save draft“ to save the message.

✓ The message is moved into the “Drafts“ folder.

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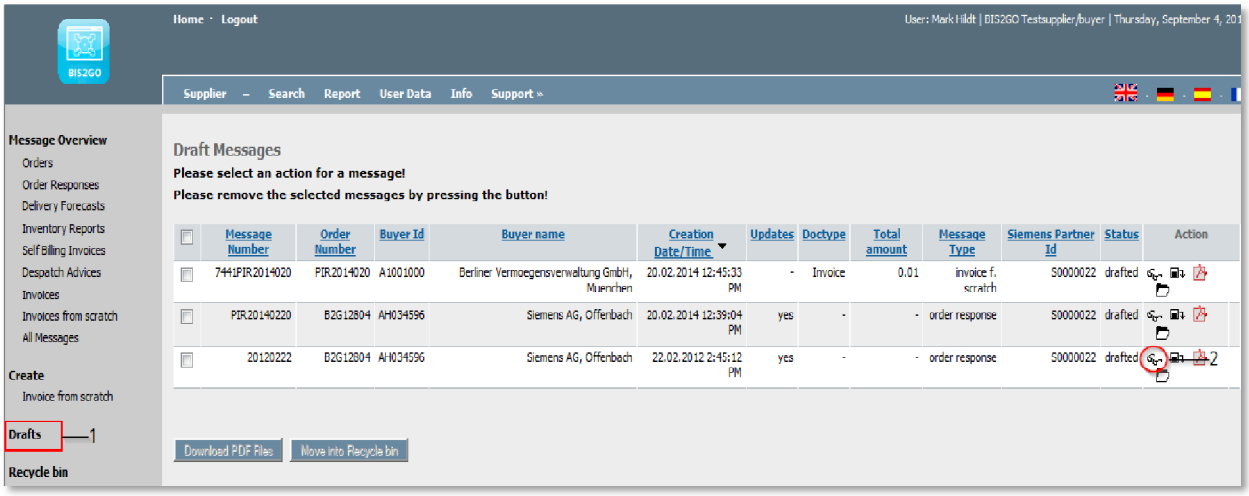
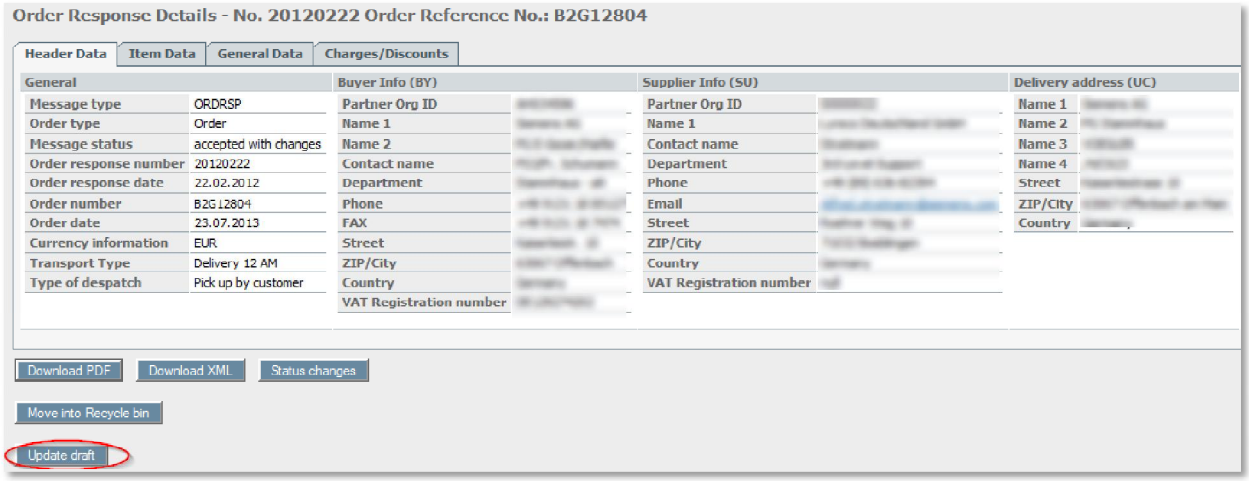
# 7.2 Edit drafts

If you have saved a message as draft and want to edit it you need to search for the message in the folder titled “Drafts“ and switch to the message “Details“.



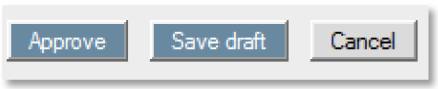

1. Click “Drafts“ in the “Message overview“.
2. Click to switch to the “Details“.

In “Details“ you can revise your order again.




3. Click “Update draft“ to edit the message.

Thereafter you can decide whether you want to send the message or a copy. If you send a copy, the draft will remain in the drafts folder after sending the message.

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# 8 Checks

The messages you entered are checked:

- when you close the screen
- when you click the “Approve“ button.

| | |
|---|---|
| | Caution:<br>If the invoice does not correspond to the defined rules you will receive an error message asking you to correct the errors. |
| | Note:<br>All tabs marked with are screens with mandatory entries. |
| | Note:<br>Fields marked with  are mandatory fields. |

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# 9 Supplier/customer privileges

As BIS2GO user you have the following privileges:

- Change your own user data
- Change your own partner data
- Receive and read all messages types supported by BIS2GO
- Change your own password

In partner role “Supplier“ you have the following privileges:

| Message type | Meaning | Action |
|---|---|---|
| ORDERS | Order | Display, print |
| ORDCHG | Order change | Display, print |
| DELFOR | Delivery schedule | Display, print |
| INVRPT | Inventory report | Display, print |
| ORDRSP | Order response | Display, print and generate |
| INVOIC | Invoice | Display, print and generate |

In partner role “Customer“ you have the following authorizations:

| Message type | Meaning | Action |
|---|---|---|
| ORDERS | Order | Display, print and generate a new |
| ORDCHG | Order change | Display, print and generate |
| ORDRSP | Order response | Display, print |
| DELFOR | Delivery schedule | Display, print |
| INVRPT | Inventory report | Display, print |
| INVOIC | Invoice | Display, print |
| DESADV | Delivery notice | Display, print |

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# 10 Glossary

| Terms | Definition |
|---|---|
| Avis-Email | Sends an email to the specified email address whenever a message is received. |
| EDI | Corporate Service EDI (CS EDI)<br>Enables the worldwide integration of business processes by electronic message exchange. Includes process steps from order placement and delivery to invoice generation. |
| Tab | A tab is a sorting and navigation tool for structuring individual elements. |
| Screen | A screen presents a frame on the monitor in which the user can enter the data like in a form or can change the data, or in which the software system enters the desired data. |
| ORG-ID | Organization identifier |
| Partner role | In BIS2GO, users are assigned the following roles: supplier, customer or supplier + customer. The users have different privileges, depending on their role. |
| PDF | Portable Document Format |
| PKI | Public Key Infrastructure<br>Provides the basis for a secure communication and storage of corporate information, and is the prerequisite for trustworthy and legally binding transactions via public networks. |
| Reminder-Email | Reminder function sending a reminder email if a message remains unread in BIS2GO for more than 2 days. |
| Report | Report or evaluation |
| SSD | Siemens-Schlüssel-Datenbank (Siemens Key Database)<br>Contains all partners participating in the electronic business transactions with an identifying key and additional attributes. |
| XML | Extensible Markup Language |

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